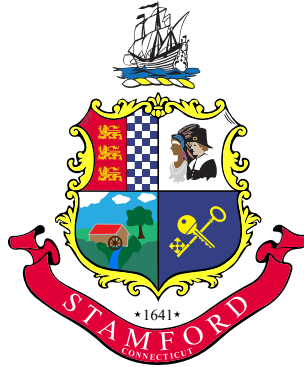




PROPOSAL

Presented to the City of Stamford



For RFP No. 806: Project Manager - ERP Systems
Identification and Implementation

Presented by:

Information Services Group (ISG) Public Sector

July 23, 2020

imagine your future®



Copyright © 2020, Information Services Group, Inc. All Rights Reserved.

No part of this document may be reproduced in any form or by any electronic or mechanical means, including information storage and retrieval devices or systems, without prior written permission from Information Services Group, Inc.



TRANSMITTAL LETTER / LETTER OF INTEREST

July 23, 2020

Erik J Larson, Purchasing Agent
City of Stamford
Office of Administration
elarson@stamfordct.gov

and

Sandra L. Dennies, Interim Director of Administration,
City of Stamford
Office of Administration
sdennies@stamfordct.gov

Dear Mr. Larson and Ms. Dennies:

International Consulting Acquisition Corp. dba Information Services Group (ISG) Public Sector is pleased to submit this proposal to the City of Stamford ("the City") Office of Administration in response to its RFP No. 806 for Project Manager - ERP Systems Identification and Implementation. ISG is proud to be based in Stamford as the headquarters of our worldwide organization.

ISG Public Sector has provided comparable services for numerous cities, counties, state governments and higher education institutions. We have focused on the public sector ERP market from our earliest engagements in 1997, and every client we have served has found success with their ERP initiatives.

ISG is a leader in guiding our public sector and enterprise clients through the complexities of planning, procuring and implementing enterprise resource planning (ERP) systems – especially with the nuances and differences within today's SaaS-based deployment models. We routinely present our research and perspectives on the competitive landscape and technology changes in the ERP market. Our advisory services for the City of Fort Worth (Texas), the City of Jacksonville (Florida) and Prince William County (Virginia) demonstrate that ISG can scale for local governments of varying size and complexity. Our local government clients consider us valued advisors and subject matter experts in delivering the full range of services required of an ERP initiative.

We also provide ERP services to some of the largest, most complex commercial enterprise clients, further strengthening our ERP platform and systems integrator knowledge, as well as our experience providing guidance and oversight to strategy, procurement, deployment and post-deployment optimization phases.

We are confident that our project manager, engagement methodology, project approach, supporting subject matter experts and public sector expertise will meet the City's requirements and exceed expectations in completion of the requested ERP services.

2187 Atlantic Street
Stamford, CT 06902

+1 203 517 3100 tel

+1 203 517 3199 fax ii



In compliance with the Letter of Interest elements per the RFP Proposal Instructions section, ISG makes the following statements:

- **Expression of Interest Statement:** ISG is willing to, interested in and able to provide the services described in RFP No. 806, Project Manager - ERP Systems Identification and Implementation.
- **Certification of Qualifications:** ISG certifies that we meet the primary qualifications identified in RFP No. 806 and will continue to do so throughout any resulting contract period.

All required forms and disclosures are included in **Appendix A**.

I will serve as the City's point of contact for this solicitation. I am a partner in our firm, and I am authorized to negotiate and contract on behalf of ISG Public Sector. If you have any questions or require additional clarifications regarding our proposal, please contact me via phone at +1 (512) 970 0745 or by email at Nathan.Frey@isg-one.com.

Sincerely,

A handwritten signature in blue ink that reads "Nathan L. Frey".

Nathan L. Frey – Partner
ISG Public Sector

Table of Contents

1	LETTER OF INTEREST	1
1.1	City of Stamford Scope of Services.....	1
2	EXPERIENCE AND QUALIFICATIONS	3
2.1	Our Firm.....	3
2.2	Our Team	5
	Key Resource – Project Manager	5
	Key Resource – Project Partner	8
	Active Motor Vehicle Operator’s License	10
2.3	Solution Approach for City of Stamford	11
	Planning	11
	Acquisition	12
	Implementation	13
	Communications & Organizational Change Management	14
	Ongoing Project Management.....	15
2.4	Committed Staff and Organization.....	16
	Roles and Responsibilities.....	17
3	REFERENCES.....	18
4	FEE PROPOSAL.....	23
4.1	Proposal Assumptions	23
4.2	Legal Agreement – Proposed Additions	24
5	APPENDIX A – FORMS.....	25
5.1	Contractor’s Statement	25
5.2	Non-Collusion Affidavit.....	26
5.3	City of Stamford State of Connecticut Contractor Verification.....	27
5.4	A Certificate of Corporate Resolution	28
5.5	Proposer’s Information and Acknowledgement Form	31
5.6	Department of the Treasury Internal Revenue Service Form W-9.....	32
5.7	Commission on Human Rights & Opportunities Contract Compliance Regulations	33
6	APPENDIX B – DETAILED RESUMES	38
7	APPENDIX C – DETAILED SOLUTION METHODOLOGY.....	54
	Project Management	54



Planning	57
Acquisition	59
Implementation & Organizational Change Management.....	62

1 Letter of Interest

International Consulting Acquisition Corp. dba Information Services Group (ISG) Public Sector is pleased to submit this proposal in response to RFP No. 806 to the City of Stamford (“the City”) for Project Manager - ERP Systems Identification and Implementation. We appreciate this opportunity to provide such support and want to affirm ISG’s commitment to this project, leveraging our resources, market data and unparalleled experience to help the City achieve its strategic objectives. Please see our formal statement of interest and certification to meet RFP qualifications in our transmittal letter (above).

1.1 City of Stamford Scope of Services

ISG understands the City’s objective to hire persons qualified in facilitating organizational change in IT Infrastructure, including the identification of existing systems and practices, identification of areas of IT integration of systems, identification of an ERP Provider, assistance in negotiation of purchase and all steps to implementation of the new system, including appropriate alteration of current practices and procedures.

What the City is requesting is exactly what we have been about since our founding in 1997 – advising public sector entities in acquisition and implementation of ERP systems. Based on that experience, we have aligned the City’s scope of services and staff characteristics with our major service areas as depicted in the graphic below. The services areas align to our proven ERP methodology which has guided numerous public sector clients in the successful achievement of their objectives.

Planning	Acquisition	Implementation
<ul style="list-style-type: none"> Provide principles and practices of change in systems Provide financial and related systems knowledge Create and maintain models of planning Read, interpret, and apply complex applications Develop systems change plan Develop time schedule Create and maintain activity database Identifies and supports governance participants 	<ul style="list-style-type: none"> Lead RFP development for ERP systems Lead selection and negotiations Identify additional consulting skills and lead RFP development and acquisition of those services 	<ul style="list-style-type: none"> Lead full implementation planning and orchestration for change Guide transition planning of staff Setup network of individuals to facilitate implementation Assist with training activities Ensures financial systems adhere to relevant terms and conditions required
Communication and Organizational Change Management		
<ul style="list-style-type: none"> Provide strong oral and written communications Create and maintain electronic communications Provide communications practices, procedures, operations, equipment, and staffing requirements 	<ul style="list-style-type: none"> Organize and facilitate groups Provide on-going communications to Stamford officials on implementation status Develop written communications and response for the public, the media, and policy makers 	<ul style="list-style-type: none"> Encourage creativity and enthusiasm for the development of a quality ERP program Demonstrate cultural competence Submit monthly report of activities
Characteristics of Advisors		
<ul style="list-style-type: none"> Willingness to take direction Work collaboratively with diverse organizations and interests and abilities 	<ul style="list-style-type: none"> Strong initiative and ability to work independently Remain calm in stressful situations 	<ul style="list-style-type: none"> Excellent interpersonal skills Computer proficiency in Word, PowerPoint, Excel, & others
Experience, Knowledge, Skills, and Abilities of Proposed Advisors: Chuck Williams, Charles Williams, and Thomas Ortiz		
Capabilities, Methodologies, Tools, and Personnel of the broader ISG Firm		

Figure 1: Overview of City Requested Services and Characteristics

ISG Public Sector and our proposed project manager have in excess of 20 years of experience providing the following services that align with the City's scope and objectives.

- Current market knowledge of the Software-as-a-Service ERP software providers to the public sector,
- Experience in procuring systems integration services and independent project management/oversight of all relevant deployment models,
- Documentation of as-is and to-be processes and identification of process improvement opportunities,
- Identification of integration opportunities and reduction of "shadow" systems and manual workarounds,
- Documentation of functional and technical requirements,
- Development of a procurement strategy, creation of procurement documents, and facilitation of the solicitation process,
- Negotiation of software license and subscriber agreement and integration services contracts,
- Provision of independent project management and implementation oversight services, and
- Organizational change management strategies and techniques, specifically as related to finance transformation and ERP implementations.

Not only do we bring advisors with deep experience, but our people are also supported by methodologies and tools designed specifically to guide the City in the achievement of its objectives. Through the support of an engagement partner and project manager, we offer the City access to our firm's full methodology, the breadth of experience of our public sector practice and ISG corporate resources at large.

The following graphic summarizes our phased-based approach from planning and acquisition through implementation, with supporting activities in project management, communication and organizational change management.

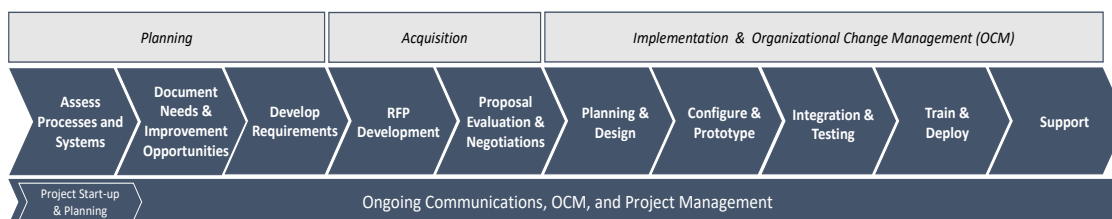


Figure 2: ISG ERP Methodology

While not specifically requested, we have included details of our methodology in Section 2.3 and Appendix C of our proposal.

2 Experience and Qualifications

In the RFP, the City seeks a firm with experience in leadership and timely facilitation of systems changes in a municipal setting. Further, the City desires that the firm have experience in organizational settings that are similarly sized and demonstrate a diversity in knowledge, skills and abilities of personnel. Through those experiences, the firm should create an environment where personnel are willing to change processes and practices and are adequately trained to be successful in the new environment. In this section, ISG will demonstrate how we possess the experience and qualification to achieve the City's objectives for this RFP.

2.1 Our Firm

ISG (Nasdaq: III), with its global headquarters on 2187 Atlantic Street Stamford, Connecticut, is a leading global technology research and advisory firm that helps public sector organizations and corporations achieve operational excellence and faster growth. A trusted business partner to more than 700 clients, including more than 20 states and 75 of the top 100 enterprises in the world, ISG specializes in:



- ERP and digital transformation services
- Service delivery model optimization for HR, finance, procurement and other business support functions—process and organizational redesign, automation assessment and shared services design and execution
- Robotics process automation implementation to augment staff
- Cloud and data analytics
- Sourcing advisory
- Managed governance and risk services
- Network carrier services
- Technology strategy and operations design
- Organizational change management
- Market intelligence and technology research

ISG employs more than 1,300 professionals operating in more than 21 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive market data. For additional information, visit www.ISG-One.com.

ISG Public Sector

ISG helps public and private sector organizations transform and optimize their operational environments with a complete range of consulting services, focusing on information technology, business process transformation, program management services, market research and enterprise resource planning. ISG Public Sector is entirely focused on advising public sector and higher education clients, but we also have the benefit of leveraging the best industry practices and market data from our broader enterprise clients and service offerings.

Services offered by ISG Public Sector include:

- Assessment of legacy administrative systems;
- Contract negotiations;

- | | |
|--|--|
| ▪ Business case and return on investment (ROI) analyses; | ▪ Independent project management and/or oversight; |
| ▪ “As-is” and “to-be” business process mapping and analysis; | ▪ Staff augmentation services; |
| ▪ Feasibility and alternative solution studies; | ▪ Organizational change management services; |
| ▪ Needs assessment and requirements definition studies; | ▪ Robotic process automation; |
| ▪ Development of requests for proposal, requests for information, and other procurement documents; | ▪ Software and hardware asset management; |
| ▪ Assistance in evaluation and selection of enterprise software and implementation services; | ▪ Network and telecom management; |
| | ▪ Finance and HR service delivery transformation |
| | ▪ IT sourcing advisory services; and |
| | ▪ Cloud assessment, strategy, and sourcing services. |

Table 1: ISG Public Sector Service Offerings

Most importantly for the City, ISG Public Sector has been helping government and higher education organizations acquire and implement new administrative systems for the past 23 years. During this time, ISG has developed a methodology, including a supporting set of tools, for the assessment of ERP-related functions and the acquisition of ERP software and associated services which is public sector-focused and addresses the leading practices, such as the Software-as-a-Service (SaaS)/hosted solutions available in the market today. Our methodology and tools are proven and have been used for numerous public sector and higher education ERP engagements with a similar scope of services to that requested by the City, including the following ERP projects:

- | | | |
|---|---|--|
| <ul style="list-style-type: none"> 🔸 City of Jacksonville, Florida ▪ City of Fort Worth, Texas 🔸 City of Philadelphia, Pennsylvania ▪ City of Houston, Texas ▪ Orange County, California 🔸 Prince William County, Virginia ▪ Harris County (Houston), Texas ▪ Los Angeles County, California ▪ Tarrant County, Texas ▪ Johnson County, Kansas 🔸 District of Columbia ▪ Metropolitan Transit Authority of Harris County (METRO), Texas ▪ Texas Conference of Urban Counties 🔸 SaaS/Cloud-related | <ul style="list-style-type: none"> ▪ State of Alaska 🔸 State of Arizona ▪ State of Arkansas ▪ State of Florida 🔸 State of Idaho ▪ State of Indiana ▪ State of Kansas ▪ Commonwealth of Kentucky ▪ State of Louisiana ▪ State of Michigan ▪ State of Minnesota ▪ State of Mississippi 🔸 State of Missouri ▪ State of Nebraska ▪ State of Nevada ▪ State of Oklahoma ▪ State of Rhode Island | <ul style="list-style-type: none"> ▪ State of Tennessee ▪ State of Texas (multiple agencies) ▪ Commonwealth of Virginia ▪ State of Washington Office of State Auditor ▪ State of West Virginia ▪ State of Wisconsin 🔸 Texas State University 🔸 The University of Texas at Austin 🔸 The Texas A&M University System 🔸 Arizona State University 🔸 The University of Arkansas System 🔸 University of Maryland, Baltimore 🔸 Washington State University |
|---|---|--|

Table 2: ISG Public Sector ERP Projects

Operational excellence is our business. Our mission is to support public sector clients as they transform and optimize their operational environments through research, benchmarking, consulting and managed services, with a focus on information technology, business process transformation program management services and enterprise resource planning.

From our extensive experience, we have developed the most robust market data, the deepest knowledge of the Cloud ERP software platforms and systems integrators and the most real-life experience in what it takes to achieve success in both deployment and adoption of the software to reap the benefits within a public sector environment. Not only does our organization have the largest and most complex government experience, but the individuals proposed for this engagement each have more than 20 years of experience in public sector and ERP solutions. Our qualifications for this work are unmatched.

2.2 Our Team

Combined, the service delivery team from ISG has several decades of experience delivering ERP advisory services to local governments. Mr. Chuck Williams and Mr. Thomas Ortiz have advised clients from the early stages of planning and acquisition through the completion of ERP implementation and on-going operations. We bring to the City of Stamford the understanding of the applications of technology to the broad scope of processes and services delivered by today's municipalities as well as the unique needs of civil service departments and 24/7 operations such as water and wastewater management. **We know those processes within municipalities where it makes sense to consolidate onto a single ERP software platform as well as those where a hybrid, or best-of-breed solution would serve the needs of the City better overall.** Moreover, we understand the scrutiny these large municipal technology projects receive due to the proximity of the project to executive management and elected leadership. Our experience brings awareness to the service of the City to allow it to achieve its transformation objectives.

Key Resource – Project Manager

Mr. Chuck Williams is a subject matter expert in financial management systems, budget formulation management systems and related processes, policy and procedure development, cost and effort estimation, project planning and scheduling and creative problem resolution. He has recently provided project management for software-as-a-service, cloud-based and hosted systems for his clients. Chuck has hands-on experience with CGI ADVANTAGE, Oracle PeopleSoft Enterprise, SAP and Microsoft Dynamics 365 for Finance and Operations. He is a proficient and organized technical writer and presenter, with skills in both the software/technical and accounting fields.

See Chuck's short resume below and a more detailed resume in **Appendix B**:



Chuck Williams, PMP

Director, ISG Public Sector

Phone: +1 952.923.0883

E-Mail: chuck.williams@isg-one.com

ISG Role

Chuck Williams has been a director in the ISG Public Sector practice for more than five years. He has extensive oversight experience in public sector financial, HCM, payroll and budget formulation systems integration projects with more than thirty years of proven public sector experience in ERP project oversight of large ERP system implementations, RFP development, project management and ERP implementations. He offers recognized expertise and leadership of public sector implementation projects and production operations. Chuck offers insights and creativity in contract negotiations, project planning, solution architecture, business process analysis and design, change management, requirements traceability and verification, help desk and projects focused on business process improvement and efficiency. He is a subject matter expert in financial management systems, budget formulation management systems and related processes, policy and procedure development, cost and effort estimation, project planning and scheduling and creative problem resolution. He has recently provided project management for software-as-a-service, cloud-based and hosted systems for his clients. Chuck has hands-on experience with CGI ADVANTAGE, Oracle PeopleSoft Enterprise, SAP and Microsoft Dynamics 365 for Finance and Operations. He is a proficient and organized technical writer and presenter, with skills in both the software/technical and accounting fields. Chuck maintains his certification as a Project Management Professional (PMP).

Experience

Chuck has served in multiple roles in enterprise software projects for ISG Public Sector. For engagements prior to the acquisition of software and services, he has fulfilled key roles in requirement gathering efforts and played an advisory role in contract negotiations with vendors. Following successful acquisition of software and services, he has served as a primary advisor to project management and functional teams, provided solution architecture expertise coordinating cross-functional business decisions across multiple business systems (financials, HR and payroll), advised clients and vendors on solutions to complex business issues for which the standard solution may not meet the needs of the client, performed quality assurance on projects, led cultural change management efforts and directed training and transition efforts.

Chuck is an accomplished and experienced project manager. Prior to joining ISG, Chuck participated in several ERP implementations including CGI ADVANTAGE, Oracle PeopleSoft Enterprise, SAP and Microsoft Dynamics 365 for Finance and Operations filling roles that range from module-specific business analyst and consultant to project manager. His entire career has focused on developing and



Chuck Williams, PMP

Director, ISG Public Sector

Phone: +1 952.923.0883

E-Mail: chuck.williams@isg-one.com

deploying enterprise software for a more efficient business and better user experience in the public sector. As an ISG project manager, he has overseen full lifecycle projects from system design, to configuration, testing, end-user training, production readiness, implementation/rollout and post rollout support. Chuck maintains his skills and knowledge in this field, and he has been certified as a Project Management Professional (PMP). A few representative clients where he has directed engagements and managed projects includes University of Minnesota, Columbia University of New York, U.S. Customs and Border Protection, State of West Virginia, West Virginia Department of Transportation, State of Delaware, Oakland County, MI, Montgomery County, OH and Orange, Broward and Palm Beach Counties, FL.

Chuck excels at client/vendor relationship management and issue resolution relying on his public sector expertise to drill down into business system, relationship and contractual issues to develop a detailed understanding of client business requirements, the capabilities of the system being implemented, the conflicts between clients and vendors, contractual issues, change orders and adjustments to project scope always keeping client business needs and system usability at the forefront of the conversation. Chuck's extensive experience with financial, procurement, project and grant accounting, cash/treasury management, accounts payable and receivable, billing, budget formulation, human resources and payroll systems gives him a unique perspective on considerations to ensure all business decisions will incorporate impacts on other systems and users to develop business and technical requirements and implement a truly integrated solution.

Education and Credentials

Project Management Professional

Bachelor of Arts in Accountancy, University of Northern Iowa, 1982

Additional course work in Organizational Development and Change Management, Georgetown University, Washington, DC.

Representative Experience

Local Government

Montgomery County, OH	2017 - 2020
City of South Bend, IN	2017 - 2020
Oakland County, MI	2003 - 2007
Palm Beach County, FL	
Broward County, FL	
Orange County, FL	1987 - 1990
City of Yonkers, NY	



Chuck Williams, PMP

Director, ISG Public Sector

Phone: +1 952.923.0883

E-Mail: chuck.williams@isg-one.com

State Government

West Virginia Department of Transportation 2016 - 2017

State of West Virginia 2012 - 2016

State of Delaware 1987 - 1990

Other

University of Oklahoma Health Sciences Center 2016 - 2017

U.S. Customs and Border Protection 2010- 2012

City utilities of Springfield, MO 2006 - 2007

Columbia University of New York 1992 - 1994

University of Minnesota

Anne Arundel County Public Schools, MD 1987 - 1990

Key Resource – Project Partner

Mr. Thomas Ortiz has served as lead of ISG’s Local Government practice area for the past five years. He has advised local government clients in the full life cycle of planning, acquisition, implementation and operation of an ERP system across functions such as general ledger, accounts payable, accounts receivable, asset management, cash management, project and grant accounting, purchasing, sourcing, human resources, administration, benefits administration, payroll and budgeting. In addition, he has worked with local government and other clients in the deployment of the latest robotic process automation solutions to further enable business processes with technology allowing administrative staff to move to more valued work activities.

See Thomas’ short resume below and a more detailed resume in **Appendix B**:



Thomas Ortiz, PMP

Partner and Co-lead of ISG Public Sector & Higher Education

Phone: +1 512.762.3975

E-Mail: thomas.ortiz@isg-one.com

ISG Role

Thomas Ortiz co-leads Information Services Group (ISG) Public Sector and Higher Education practice and specializes in providing enterprise transformation, information technology and



Thomas Ortiz, PMP

Partner and Co-lead of ISG Public Sector & Higher Education

Phone: +1 512.762.3975

E-Mail: thomas.ortiz@isg-one.com

project management services to state and local governments. His over twenty-five (25) years of experience includes services ranging from ERP procurement and selection advisory services, robotic process automation, Software-as-a-Service acquisition and evaluation, software system design, testing, implementation, business process reengineering, organizational redesign, change management, and program management office operation. His background includes functional areas such as purchasing, e-procurement, inventory management, human resources, time and attendance, payroll, project accounting, licensing, and permitting.

Career Experience

Thomas has advised numerous public sector clients on major enterprise transformation projects. He has led system requirement gathering efforts, advised on procurement strategy, authored the primary procurement documents (requests for proposal), facilitated the evaluation and selection process, and led contract negotiations with vendors. He has served as a primary advisor to project management, performed quality assurance on projects, led cultural change management efforts and directed training and transition efforts. He has led the creation of new organizations and the design and implementation of the related business processes. Thomas has also led several strategic planning efforts with clients in the definition of clear and compelling future state vision, mission, goals and objectives.

Education and Credentials

Thomas earned his Bachelor of Arts from Austin College and holds a Master's degree in Public Affairs from the University of Texas. He completed an Organizational Development Certificate from the Master of Applied Industrial/Organizational Psychology program at Colorado State University. He is also certified as a Project Management Professional (PMP) by the Project Management Institute. Thomas currently serves on the Board of the Episcopal Health Foundation, a \$1 billion-dollar foundation focused on the improvement of health and well-being of the 10 million people in the 57 counties of the Diocese of Texas.

Representative Experience

State of Washington Office of Financial Management	Sep 2019 - present
City of Philadelphia, Department of Revenue	Mar 2018 – Aug 2019
Idaho State Controller's Office	Sep 2018 – Jul 2019
City of Denton, Texas	Aug 2017 – Jan 2018
Prince William County, Virginia	Apr 2017 – Nov 2019
City of Fort Worth, Texas - Procurement	Oct 2017 – Dec 2018
City of Fort Worth, Texas – Financials	Jul 2012 – Oct 2017
City of Philadelphia, Office of Innovation & Technology	Aug 2016 – Dec 2016
Idaho Department of Health and Welfare	Jan 2016 – Apr 2016



Thomas Ortiz, PMP

Partner and Co-lead of ISG Public Sector & Higher Education

Phone: +1 512.762.3975

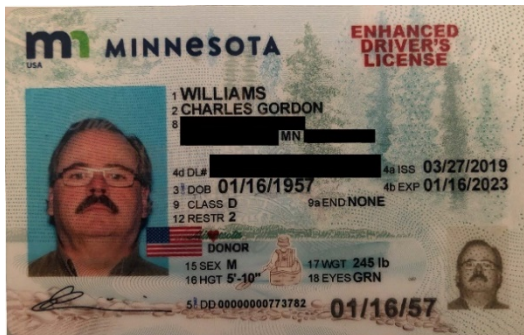
E-Mail: thomas.ortiz@isg-one.com

City of Jacksonville, Florida	Apr 2015 – Aug 2019
Arizona Department of Administration	Jan 2012 – Aug 2012
State of Arkansas	Sep 2011 – Dec 2011
City of Fort Worth, Texas – HR/Payroll	Jun 2007 – Aug 2011
Minnesota Department of Finance and Administration	Sep 2006 – May 2007
City of Houston, Texas	Feb 2006 – Aug 2006

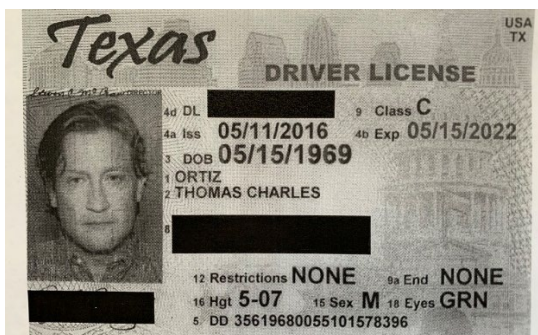
Active Motor Vehicle Operator's License

As requested in the RFP, please find below redacted versions of our project team's active motor vehicle operator licenses.

Chuck Williams



Thomas Ortiz



Non-redacted images of these individuals' licenses will be made available to the City, as required following the procurement process.

2.3 Solution Approach for City of Stamford

In addition to obtaining the skills of a highly experience ERP Project Manager, the choice of ISG as the City's partner brings access to the full ERP experience, qualifications and methodologies of ISG. As a firm, ISG Public Sector brings a comprehensive approach and methodology to the planning, acquisition and successful implementation of ERP systems for public sector organizations.

Proposed services for the City are based on our proven ERP Methodology and our vast experience in managing numerous, large-scale systems projects for our local government, state and higher education clients. Our approach includes all the services identified in the City's RFP that are necessary to support the planning, selection, implementation and stabilization of the ERP project.

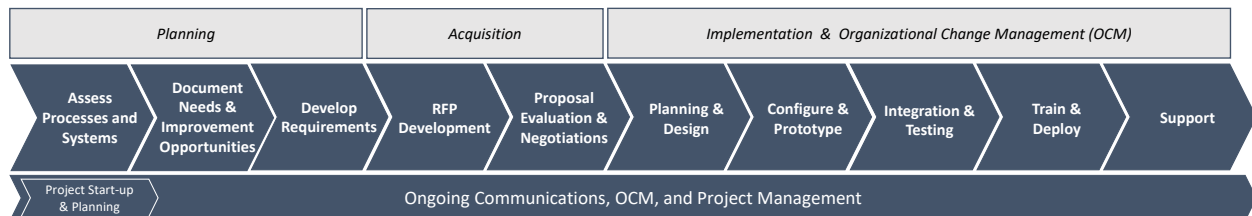


Figure 3: ISG ERP Methodology

In the following section, we have grouped the duties and skills listed in the City's RFP into the broad activity categories used in our methodology. For each category, we have restated the City's requirements followed by a summary description of how our methodology addresses those requirements. In the following descriptions, the activities attributed to ISG will be principally performed by Chuck Williams, our proposed project manager. Chuck will be supported in these activities by Thomas Ortiz, engagement partner, and guided by the use of our methodology, tools and templates.

For a more complete description of the phases and activities included in our methodology, we have included detailed explanations in Appendix C.

Planning

Duties and skills per the RFP:

- Identifies participants in planning/governance committees and lends support to their process.
- Develops a systems' change plan for the City of Stamford, including identification of integrating systems and alteration of current practices to facilitate that integration.

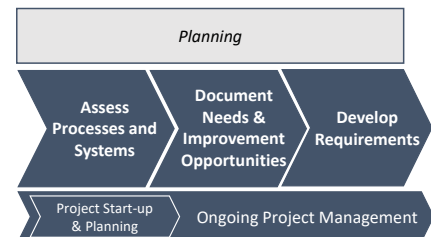


Figure 4: Planning

Planning represents the foundational activities of the City's ERP project. During the initial planning and project start-up phase, ISG will focus on those activities necessary to initiate the

project, establish governance and stakeholder engagement, and begin the ongoing project management activities to manage and sustain the project throughout all subsequent phases. A more complete summary of ongoing project management and related duties and skills are provided below in our description of Ongoing Project Management.

During our planning phase, we will assess current systems and processes to develop a begin a systems change plan. We will identify the scope of functionality, integrating systems and expected changes in current practice that are likely needed as the City transitions to a new ERP system. We will also document unmet needs and identify improvement opportunities to improve the City’s business processes. Lastly, we will develop a set of “to-be” business requirements for the City’s necessary functionality. The system change plan will provide key inputs into the acquisition process, as ISG develops the RFP, system requirements and necessary integrations for the future state environment.

Acquisition

Duties and skills per the RFP:

- Provides leadership in the development of an RFP for an ERP system and facilitates selection efforts, as well as pricing and payment arrangements with the selected system provider.
- Identifies skills that additional consultants should bring to the City’s change process and writes the RFP’s for the City’s procurement of such skills.
- Adheres to all the relevant terms and conditions as provided for in all governing requirements of financial systems.

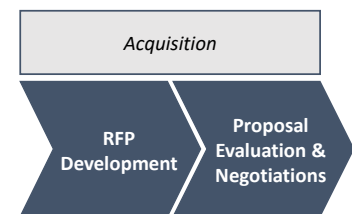


Figure 5: Acquisition

Acquisition represents the activities leading to the solicitation process, evaluation of proposals and negotiation of contracts for software and implementation services. During acquisition, ISG will develop work products to facilitate the procurement of software and services. Those work products include: procurement strategy, documented evaluation process and evaluation guide, comprehensive set of solicitation documents (e.g., RFP, draft contract or statement of work, requirement response forms, pricing schedules, etc.). In developing the solicitation documents, we will also consider the City’s standard terms and conditions, note necessary staffing and project team skills. If necessary, we can work with City legal staff to review of contract issues that are relevant to contracting for software-as-a-service systems and complex statement of work issues with systems integrations contracts. ISG has extensive experience in negotiating ERP-related contracts and will be an avid advocate for the City’s best interests during contract negotiations.

Implementation

Duties and skills per the RFP:

- Assumes lead staff role for full implementation planning and orchestration of change for the City of Stamford.
- Sets up and maintains a network of key individuals to be used by the Stamford Office of Administration to facilitate implementation steps.
- Develops appropriate time schedule for conduct of work to be accomplished in making the systems change.
- Creates and maintains activity database to ensure timeframes for conduct of systems change remains on schedule.

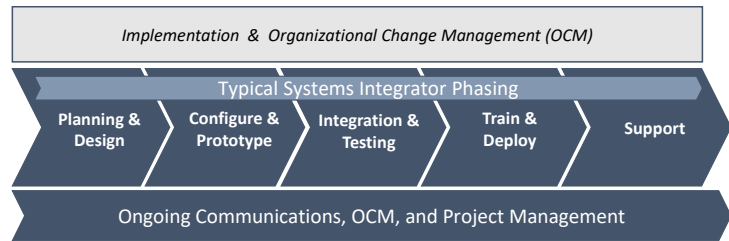


Figure 6: Implementation and OCM

Implementation comprises all activities carried out to manage the implementation process and coordinating the efforts of both the systems integrator and City personnel. ISG's intent is to be an active player in the implementation – to bring to bear our prior project implementation and QA experience and insights to support the successful accomplishment of the City's goals and objectives. As the City's project manager, Chuck will assume the lead staff role for guiding the City's implementation.

ISG will work with the City to establish expected project schedules and timeframes for completion of major project milestones. These key activities will be documented in the City's RFP for software and systems integration services and ultimately translated into professional service agreements and a statement of work for the selected systems integrator. During the implementation, ISG will coordinate project schedules and maintain the database of key activities to monitor progress and achievement of milestones. Significant matters that threaten project success will be address collaboratively with City leadership and the systems integrator.

ISG's methodology focuses on leveraging the project approach and phasing of the selected systems integrator. By serving as an independent project manager, Chuck will provide project management expertise and apply experience applicable to each project phase. The typical systems integrator's approach follows approximately five major phases from planning through post-implementation support. During the implementation, ISG will foster relationships between key individuals that will provide the project governance and network of stakeholders to support the configuration, testing, training and organizational change activities. Many of these objectives are accomplished by review of deliverables, active management of risks and issues, contract compliance reviews and status reporting to City leadership, governance team members and business process owners.

Communications & Organizational Change Management

Duties and skills per the RFP:

- Assists with and/or provides training for staff in all departments.
- Provides ongoing communication to Stamford officials on implementation status.
- Develops written communications and responses for the public, the media, and policy makers on issues of project implementation.
- Encourages creativity and enthusiasm for the development of a quality ERP program in the City of Stamford.
- Works closely with staff on transition planning.
- Demonstrates cultural competence by exhibiting behaviors, skills, attitudes, awareness, acceptance, and respect for differences among people.

Organizational change management (OCM) includes communications, training and all other activities necessary to assist City staff in adopting the changes in business process and becoming proficient in use of the new software when migrating to the new ERP system. During each major phase of an ERP implementation, there is an underlying set of activities to ensure active communications to leadership, stakeholders, users and affected external parties (e.g., vendors) of key information that they will need to fulfill their role in the project.

OCM activities will address a majority of the City's requirements stated above. By being an active and enthusiastic proponent of the City's ERP project, Chuck can provide the communications support, both written and oral, to be an advocate for change. ISG will work closely with City staff to identify change impacts and work with leadership and the systems integrator to address those impacts in a way that promotes positive change rather than passive resistance. As a veteran of many ERP implementations, Chuck can support the City's organization and delivery of training for end users. All of these activities will be performed with the sensibilities and cultural understanding of the various needs, backgrounds, motivations and concerns of the City's staff.

Ongoing Project Management

Duties and skills per the RFP:

- Submits a monthly report of activities to the Director of Administration.
- Attends a one-hour weekly staff meeting with the Director of Administration.
- Performs any related duties that may be reasonably required by the City.

Ongoing project management relates to the duties of the project manager for the management of ISG's services to the City **and** our role in managing the City's contract and project activities of the selected software vendor and systems integration firm.

During the Planning and Acquisition phases of the project, Chuck's project management activities will focus on managing the relationship between ISG and the City. As described above, we will undertake a formal planning and start-up phase to ensure the foundation for a successful partnership. We will provide, at minimum, the monthly report of activities to the Director of Administration and participate in the weekly staff meeting. However, we believe more frequent engagement with key leadership and stakeholders will be essential to ensure alignment on the City's goals and objectives, and critical success factors for the new ERP project. We seek to maintain efficient and practical project management processes between the City and ISG, so that both parties can focus on the priority activity of choosing the best software and systems integrator for the City's new ERP system.

Once the City has acquired ERP software and systems integration services, Chuck will reduce his attention from management of the City/ISG relationship and put a much greater emphasis on representing the project management needs of the implementation project between the City and the systems integrator. ISG's ongoing project management during the implementation focuses on status, risks, issues, schedule, funding, deliverables, payments, staffing and the like that are necessary to conduct a successful, large-scale ERP implementation.

2.4 Committed Staff and Organization

ISG understands that the City is seeking an expert project manager with experience in ERP system acquisition and implementation. For that specific function, we have committed ISG Director, Chuck Williams, to serve that role. However, ISG's commitment to your project will extend beyond that singular individual. In direct support of Chuck, we have included Thomas Ortiz as engagement partner to provide quality assurance services and serve as an additional advisory resource to the Director of Administration.

Our proposal will provide the City access to the entirety of our public sector practice and the resources of our Corporate headquarters. As describe above in experience and qualifications, public sector ERP systems are the core of our service offerings and have been throughout our 23-year history.

Finally, as a company that was founded in Stamford, the City will have the commitment of Mike Connors, Chairman & CEO, and Todd Lavieri, Vice Chairman & President – Americas, who work in Stamford each day.

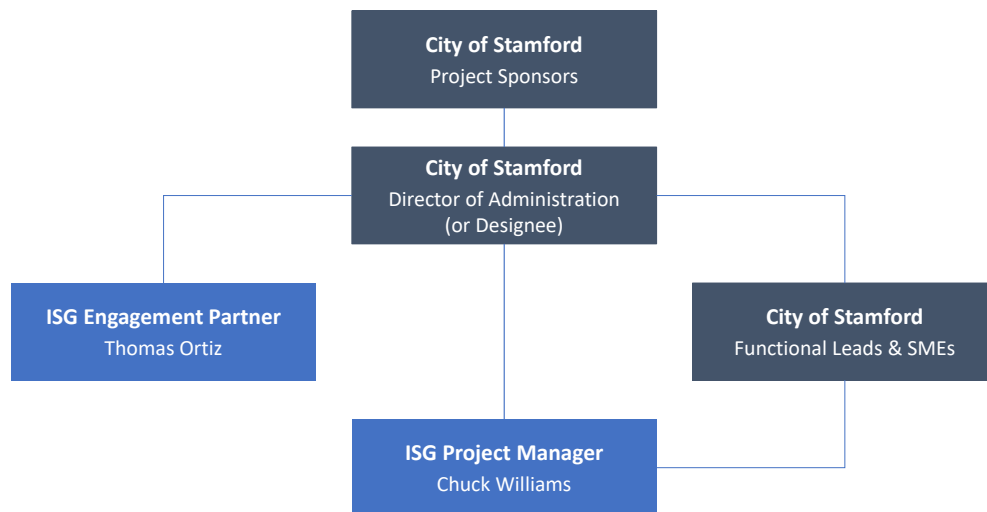


Figure 7: Proposed Project Organization

Roles and Responsibilities

The ISG project team includes the following:

Role	Responsibilities	Sample of Experience
Project Manager Chuck Williams	<ul style="list-style-type: none"> Project lead, working directly with the City of Stamford's Project Manager Manage Project Team, work efforts, and deliverables Establish and adhere to the project scope, budget, schedule and deliverables Coordinate activities between joint Project Team members Support development and analysis of the City of Stamford requirements and service provider proposals Provide negotiations leadership Provide best practice domain and contracting knowledge Present findings and recommendations 	<ul style="list-style-type: none"> 20 years of experience in sourcing Strong IT operational experience and knowledge Typically has experience in managing IT operations Strong industry knowledge in a variety of sectors
Engagement Partner Thomas Ortiz	<ul style="list-style-type: none"> Maintain the City of Stamford relationship and satisfaction Respond to ongoing the City of Stamford needs Ensure quality of deliverables Monitor project execution against stated objectives Participate in steering team meetings/management checkpoints 	<ul style="list-style-type: none"> 20+ years of experience advising organizations on sourcing strategy, transactions and transition execution Extensive executive level stakeholder management

Table 3: ISG Teams Roles, Responsibilities, and Experience

Detailed resumes of our proposed project team are provided in **Appendix B**.

3 References

The following three (3) references are available for contact by the City of Stamford.

Reference # 1 City of Fort Worth, Texas	
Name	Mr. Monty Hall
Title	Assistant Director, City of Fort Worth
Phone #	(817) 392-8662
Email Address	Monty.Hall@fortworthtexas.gov
Scope	<p>Jan 2009 – Dec 2010 (pre-implementation – PeopleSoft – Financials)</p> <p>Jan 2013 – Oct 2015 (implementation – PeopleSoft – Financials)</p> <p>Nov 2015 – Sep 2017 (post implementation support – PeopleSoft – Financials)</p> <p>September 2016 – June 2017 (PeopleSoft – Human Capital Management)</p>
Description of Services	<p>ERP Financials Requirements Definition, Proposal Evaluation Advisory Services, and Project Oversight Services</p> <p>The City of Fort Worth selected ISG Public Sector to provide consulting expertise in the acquisition and implementation oversight of an enterprise resource planning system for its financials, budgeting, and procurement functions. ISG provided the following services:</p> <p>Pre-implementation:</p> <ul style="list-style-type: none"> Facilitated group sessions with subject matter experts to define financial requirements; Developed detailed demonstration scripts to support confirmation sessions to ensure the PeopleSoft solution would meet the City's financial business needs; Created a request for proposal to solicitation system implementation services; Facilitated the evaluation of proposals submitted for ERP associated implementation services; Facilitated the vendor presentations; and Supported the City's project management in contract negotiations. <p>Implementation</p> <ul style="list-style-type: none"> Provided project management support in terms of schedule management, risk and issues management, and deliverable reviews; Supported City's functional consultants in areas of the general ledger, commitment control, and accounts payable design and configuration;

Reference # 1 City of Fort Worth, Texas	
	<ul style="list-style-type: none"> Provided data conversion planning services and managed team of staff augmentation accountants to execute data conversion activities; Provided interface planning, management, and testing monitoring activities; Developed approach and series of business process change and system usage videos to support the organizational change and system acceptance; Developed and managed monthly communications regarding project progress and user impacts across multiple communications channels, e.g. email, project website, department management meetings, videos, etc.; and Developed training plan, curriculum, and course materials as well as delivered training across modules in scope for deployment. <p>Post-Implementation</p> <ul style="list-style-type: none"> Provided functional support services for general ledger and commitment control; Supported City personnel in the diagnosis of system bugs and development of changes to address issues; and Supported review and triage of Help Desk tickets.

Reference # 2 City of Jacksonville, Florida	
Name	Mr. Greg Pease
Title	Chief of Procurement, City of Jacksonville
Phone #	904-255-8801
Email Address	GPease@coj.net
Scope	June 2011 – September 2011, April 2015 – August 2019 (Oracle Cloud)
Description of Services	<p>Project Planning, Advisory and Project Management Services</p> <p>The City of Jacksonville, Florida engaged ISG Public Sector to provide Enterprise Resource Planning Consulting Services. Due to a budget shortfall, the project was halted by the City in September 2011.</p> <p>As a part of this initial effort, ISG performed the following tasks:</p> <ul style="list-style-type: none"> Conducted initial planning sessions to confirm overall project scope; Reviewed and evaluated existing citywide administrative systems;

Reference # 2	City of Jacksonville, Florida
	<ul style="list-style-type: none"> ▪ Led requirements gathering sessions to document functional requirements (Finance and Procurement) for the new ERP system; ▪ Drafted a request for proposal for financial/procurement ERP software and associated implementation services; and ▪ Using its proven Return on Investment (ROI) methodology, ISG performed the following major tasks for the City: <ul style="list-style-type: none"> – Documented alternative scenarios to be analyzed; – Developed Cost Estimates for the Status Quo (current path), and the alternative to be evaluated; – Identified Avoided Costs (costs that would no longer be incurred if an ERP system was implemented); – Identified Process-improvement Savings that would be achieved if an ERP system was implemented; and – Drafted the business case to support each alternative to be evaluated. ▪ The City re-engaged ISG in April of 2015 to restart the project and provide the following services with specific emphasis on SaaS solutions: ▪ Assessment of the City's current administrative systems environment including Finance, Procurement, Budget Preparation, Human Resources, and Payroll; ▪ Development of system requirements for the new ERP system, including functional, technical and general; interfacing system requirements and data conversion system requirements; ▪ Development of a Request for Proposal (RFP) for ERP software and associated and implementation services for a SaaS technology solution; ▪ Development of a formal evaluation process to be followed during the selection phase; ▪ Development of comprehensive scripts to be followed during software demonstrations and integrator oral presentations; ▪ Management of integrator oral presentations and software demonstrations; ▪ Support to the Evaluation Committee in the evaluation of all proposals received; ▪ Facilitation of contract negotiations and support; and ▪ Project oversight and quality assurance services during the implementation of Oracle Cloud solution.

Reference # 3 Prince William County	
Name	Mona Snead
Title	Project Manager, Prince William County Government
Phone #	(703) 792-5536
Email Address	MSnead@pwcgov.org
Scope	April 2017 – November 2019 (Oracle Cloud)
Description of Services	<p>ERP Project Planning and Advisory Services for a County-wide ERP Financial Management System</p> <p>ISG provided planning and advisory services to Prince William County, Virginia in support of the acquisition and implementation of a new countywide ERP human capital management system.</p> <p>Major tasks completed include:</p> <ul style="list-style-type: none"> Facilitation of working sessions with County subject matter experts to identify functional and technical requirements; Development of ERP implementation strategies; Development of solicitation document(s) to support the acquisition of ERP financial software and associated integration services; Development of a formal evaluation process to be followed during the evaluation process; Facilitation of the evaluation of proposals received for ERP software and integration services; Development of detailed demonstration scripts to be followed during vendor presentations; Facilitation of the vendor presentations in accordance with the demonstration schedule and scripts; Preparation of detailed cost analyses for each vendor offering; and Facilitation of contract negotiations between the County and the awarded ERP software and integration services vendor(s). <p>The functional scope included the following primary application areas:</p> <ul style="list-style-type: none"> Personnel Administration; Benefits Administration; Compensation Management; Position Control; Payroll; Time and Attendance; Leave Management; Recruitment and Applicant Tracking;



Reference # 3	Prince William County
	<ul style="list-style-type: none">▪ Performance Management;▪ Learning Management;▪ Succession and Talent Management;▪ Employee Relations; and▪ Risk Management.

4 Fee Proposal

The table below presents ISG's lump sum fee proposal for each proposed contract year. This price is based upon the deliverables, responsibilities, timeline and staffing defined in this proposal.

Contract Year	Annual Fee
Year 1	\$399,000
Year 2	\$399,000
Year 3	\$399,000

Annual fee is inclusive of all travel costs and incidental expenses. Per the RFP, payments will be made in equal monthly installments.

Note on COVID-19: Given the current circumstances relating to COVID-19, ISG is working closely with our clients to ensure the safety of both their staff as well as ISG staff. ISG has recently moved to a 100% remote delivery model and is confident that we can support the City in a remote model, if necessary. We have made investments in processes and technology that enable our teams to deliver engagements by interacting with our client teams via various virtual collaboration technologies. We are confident that we can provide the services and deliverables described in the City's RFP and our bid response on a virtual basis.

4.1 Proposal Assumptions

ISG's fees are based on the services requested in RFP No. 806 and described in the Scope of Services section. Other relevant assumptions in this proposal include:

- The City will assign a point of contact (e.g., Director of Administration) to assist with scheduling, data gathering and other project management activities.
- The City project leadership and key stakeholders will make decisions and respond to requests for information in a timely manner.
- ISG staff will have prompt access to key stakeholders, resources and other necessary subject matter experts during the engagement.
- Office and meeting room space will be reasonably available on-site for project-related meetings and other project-related purposes. Access will be provided to telephones, Internet connections, copiers and fax machines, as needed, to complete project tasks.
- We expect that little, if any, administrative support will be required, but in those instances when it is required, it will be provided by the City.
- ISG's weekly on-site work schedule will follow the 5/4/3 approach, which is defined as the full-time resources working on the project five days a week, on-site at the project

four days a week, and on-site in Stamford three nights a week (or four nights when needed). Typically, this schedule will be Monday through Thursday on-site at the project.

- If the State requests additional resources and/or services that are beyond the scope of a task order, such additional work shall be addressed as an amendment to the contract between the City and ISG.
- ISG will invoice the City monthly for one-twelfth of the annual fee quoted in our proposal. Invoices will be paid by the City within 30 calendar days of receipt.

4.2 Legal Agreement – Proposed Additions

ISG accepts the terms of the City's Agreement. However, we respectfully request that the city consider the following additions:

- Addition at the end of Section 5, Indemnification – Except as provided herein with respect to any indemnity provision for third party claims, breach of confidentiality, breach of security, bodily injury, damage to property, gross negligence, willful misconduct or as otherwise prohibited by applicable law or regulation, in no event will Contractor be liable to The City for any incidental, indirect, special, consequential or punitive damages or lost profits or savings and the aggregate total liability of Contractor arising from or related to the engagement of Contractor, whether in contract, breach of warranty, tort, or otherwise, shall not exceed the contract price.
- Addition as new Section 22, Ownership – Nothing herein shall change the ownership of Contractor's pre-existing materials and revisions that may be made to such pre-existing materials by or on behalf of Contractor from time to time. The pre-existing materials shall remain the sole and exclusive property of Contractor and The City is granted a perpetual, irrevocable, worldwide, royalty free, non-exclusive, non-transferable right to use the pre-existing materials for its internal purposes.



5 Appendix A – Forms

5.1 Contractor's Statement

Contractor's Statement

Pursuant to Section 103.1 of the Stamford Code of Ordinances, I hereby provide the following:

If a joint venture, trustee, partnership, limited liability company or partnership, the names and addresses of all joint ventures, beneficiaries, partners or members:

Not applicable.

If a corporation, the names and addresses of all officers, and the names and addresses of all parties owning over 10% of its common stock or over 10% of its preferred stocks. If any of said stockholders is a holding corporation, the names and addresses of all persons owning a beneficial interest in over 10% of the common or preferred stock of said holding company.

ISG has two stockholders with over 10% common stock: Private Capital Management

(address: Private Capital Management, 8889 Pelican Bay Blvd., Suite 500, Naples, Florida 34108-7512) and CPIV/Cyrille Chevrillon (address: CPIV/Cyrille Chevrillon, 4/6 Rond Point

Des Champs Elysees, Paris IO 75008).

The names and positions of all persons listed hereinabove who are elected or appointed officers or employees of the City of Stamford.

None of the persons listed hereinabove are elected or appointed officers or employees of the

City of Stamford.

Name of Bidder/Proposer: Nathan L. Frey

Signature of Bidder/Proposer: *Nathan L. Frey*

Title: Partner of ISG Public Sector

Company Name: International Consulting Acquisition Corp. (ICAC) d/b/a ISG Public Sector

Address: 2187 Atlantic Street, Stamford, CT 06902

Indicate if company submitting this proposal is: N/A MBE N/A WBE N/A DBE



5.2 Non-Collusion Affidavit

Non-Collusion Affidavit

The undersigned, having been duly sworn, affirms and says that to the best of his/her knowledge and belief:

1. The prices in this Proposal have been arrived at independently without collusion, consultation, communication, or agreement with any other Proposer or with any competitor for the purpose of restricting competition.
2. Unless otherwise required by law, the prices, which have been quoted in this Proposal, have not been knowingly disclosed by the Proposer and will not knowingly be disclosed by the Proposer prior to opening, directly or indirectly, to any other Proposer or to any competitor.
3. No attempt has been made or will be made by the Proposer to induce any other person, partnership or corporation to submit or not to submit a Proposal for the purpose of restricting competition.

Name of Proposer: International Consulting Acquisition Corp. (ICAC) d/b/a ISG Public Sector

By: Nathan L. Frey

Print Name: Nathan L. Frey

Title: Partner

ACKNOWLEDGMENT

STATE OF Connecticut

COUNTY OF Fairfield ss. Stamford

Date: 7/27/2020

Personally appeared Nathan L. Frey, as Partner
of the above named firm, and attested that the foregoing statements are true and accurate to the best of his/her knowledge and belief.

Dani R. Wehrmann

Signature of Notary Public

My Commission Expires:

DANI R. WEHRMANN
NOTARY PUBLIC
MY COMMISSION EXPIRES AUG. 31, 2021

EFFECTIVE: 2/24/09



5.3 City of Stamford State of Connecticut Contractor Verification

City of Stamford
State of Connecticut Contractor Verification (in accordance with Public Act 16-67)

Compliance Affidavit

I, the undersigned, personally and on behalf of International Consulting Acquisition Corp., having
(Contractor)
been duly sworn, affirm and say that I have read, understand and am in compliance with Public
Act 16-67 Concerning the Disclosure of Certain Education Personnel Records, Criminal
Penalties for Threatening in Educational Settings and the Exclusion of a Minor's Name from
Summary Process Complaints, and that neither I nor said Contractor, to the best of my
knowledge, is in possession of any information indicating a finding of abuse or neglect or sexual
misconduct, or otherwise have knowledge of such a condition(s) for any employees working on
the project identified in RFQ/RFP or Bid S- 806 . Further, if I or said Contractor
(RFQ/RFP or Bid Number)
become aware of any information indicating such a finding, or otherwise gain knowledge of
such a condition, I and/or said Contractor will immediately forward such information to the City
of Stamford.

Contractor Name: International Consulting Acquisition Corp. (ICAC) d/b/a ISG Public Sector

Street Address: 2187 Atlantic Street

City, State, Zip: Stamford, CT 06902

Title of person completing this form: Partner

Signature: Nathan L. Frey

Printed Name: Nathan L. Frey

Date: July 21, 2020

ACKNOWLEDGMENT

STATE OF Connecticut

COUNTY OF Fairfield

ss. Stamford

Date: 7/21/2020

Personally appeared Nathan L. Frey, as Partner
of the above named Contractor, and attested that the foregoing statements are true and accurate
to the best of his/her knowledge and belief on behalf of himself and said Contractor.

Dani R. Wehrmann
Signature of Notary Public

DANI R. WEHRMANN
NOTARY PUBLIC
MY COMMISSION EXPIRES AUG. 31, 2021

My Commission Expires: _____



5.4 A Certificate of Corporate Resolution

CERTIFICATE OF CORPORATE RESOLUTION RFQ/RFP

I, Randy Scheller, VICE PRESIDENT/TREASURER OF International Consulting Acquisition Corp. (ICAC) dba ISG Public Sector

A CORPORATION EXISTING UNDER THE LAWS OF THE STATE OF Delaware, DO

HEREBY CERTIFY THAT THE FOLLOWING IS A TRUE COPY OF CERTAIN RESOLUTIONS

ADOPTED BY THE BOARD OF DIRECTORS OF SAID COMPANY, AT A MEETING THEREOF

DULY CALLED AND HELD ON THE 1st DAY OF June, 2019.

“RESOLVED, THAT THE Nathan L. Frey

OF THE CORPORATION BE AND IS HEREBY AUTHORIZED TO SIGN A CONTRACT WITH THE
CITY OF STAMFORD, CONNECTICUT FOR

Project Manager - ERP Systems services, RFP/RFQ No. 806”.

I, FURTHER CERTIFY THAT, Nathan Frey IS THE DULY
ELECTED Partner OF International Consulting Acquisition Corp. (ICAC) dba ISG Public Sector

AND THE FOREGOING RESOLUTION HAS NOT BEEN MODIFIED OR REPEALED AND IS IN
FULL FORCE AND EFFECT.

IN WITNESS WHEREOF, I HAVE, HEREUNTO, SUBSCRIBED BY NAME AND AFFIXED THE
SEAL OF SAID CORPORATION THE 21st DAY OF July, 20 20.

Randy Scheller
VICE PRESIDENT /TREASURER



INTERNATIONAL CONSULTING ACQUISITION CORP.

Action Taken by Unanimous Written Consent
Of the Board of Directors

June 1, 2019

The undersigned Directors, constituting the entire Board of Directors of International Consulting Acquisition Corp., a Delaware corporation (the "Company"), acting without a meeting pursuant to its bylaws, does hereby consent to the adoption of and does hereby adopt the resolutions attached hereto as Exhibit A.

IN WITNESS WHEREOF, the undersigned has executed this consent as of the date written above.

A handwritten signature in black ink, appearing to read "Dale E. Berger", written over a horizontal line.

David Berger

A handwritten signature in black ink, appearing to read "Randy Scheller", written over a horizontal line.

Randy Scheller



EXHIBIT A

RESOLUTION

WHEREAS, International Consulting Acquisition Corp. (“ICAC”) doing business as ISG Public Sector desires to allow Nathan Frey to sign contractual documents with clients on behalf of ICAC.

NOW THEREFORE IT IS:

RESOLVED, that International Consulting Acquisition Corp. doing business as ISG Public Sector does hereby duly authorize Nathan Frey to sign contractual documents with clients on behalf of ICAC.

[Remainder of the page intentionally left blank]



5.5 Proposer's Information and Acknowledgement Form

PROPOSER'S INFORMATION AND ACKNOWLEDGEMENT FORM

RFP No: 806

Date: 7/23/2020

Proposer's Name: International Consulting Acquisition Corp. (ICAC) d/b/a ISG Public Sector

Street Address: 2187 Atlantic Street,

City: Stamford, State: CT Zip: 06902

Business Telephone: + 1 (203) 517-3100

Email: Nathan.Frey@isg-one.com

DUNS Number: 063077301 Tax Id. No.: 26-1376530

Indicate (Yes/No) if company submitting this proposal is:

No MBE No WBE No DBE
(If yes, attach relevant certification)

Signature: Nathan L. Frey Date: 7/23/2020

Printed Name: Nathan L. Frey

Title: Partner

Addenda Acknowledgement – check and note date of addendum

<input checked="" type="checkbox"/> Addenda No. 1	<input type="checkbox"/> Addenda No. 2
<input type="checkbox"/> Addenda No. 3	<input type="checkbox"/> Addenda No. 4
<input type="checkbox"/> Addenda No. 5	<input type="checkbox"/> Addenda No. 6
<input type="checkbox"/> Addenda No. 7	<input type="checkbox"/> Addenda No. 8
<input type="checkbox"/> Addenda No. 9	<input type="checkbox"/> Addenda No. 10
<input type="checkbox"/> Addenda No. 11	<input type="checkbox"/> Addenda No. 12



5.6 Department of the Treasury Internal Revenue Service Form W-9

Form W-9 (Rev. October 2018) Department of the Treasury Internal Revenue Service	Request for Taxpayer Identification Number and Certification ▶ Go to www.irs.gov/FormW9 for instructions and the latest information.	Give Form to the requester. Do not send to the IRS.																																																		
1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. International Consulting Acquisition Corp.																																																				
2 Business name/disregarded entity name, if different from above ISG Public Sector																																																				
Print or type. See Specific Instructions on page 3.	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.																																																			
	<input type="checkbox"/> Individual/sole proprietor or single-member LLC <input checked="" type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate																																																			
	<input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____ Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.																																																			
	<input type="checkbox"/> Other (see instructions) ▶ _____																																																			
4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small>																																																				
5 Address (number, street, and apt. or suite no.) See instructions. 2187 Atlantic Street		Requester's name and address (optional)																																																		
6 City, state, and ZIP code Stamford, CT 06902																																																				
7 List account number(s) here (optional)																																																				
Part I Taxpayer Identification Number (TIN)																																																				
Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see <i>How to get a TIN</i> , later. Note: If the account is in more than one name, see the instructions for line 1. Also see <i>What Name and Number To Give the Requester</i> for guidelines on whose number to enter.																																																				
<table border="1" style="width: 100%; border-collapse: collapse;"><tr><td colspan="10" style="text-align: center;">Social security number</td></tr><tr><td style="width: 25px;"> </td><td style="width: 25px;"> </td><td style="width: 25px;"> </td><td style="width: 25px;"> </td><td style="width: 25px;"> </td><td style="width: 25px;"> </td><td style="width: 25px;"> </td><td style="width: 25px;"> </td><td style="width: 25px;"> </td><td style="width: 25px;"> </td></tr><tr><td colspan="10" style="text-align: center;">or</td></tr><tr><td colspan="10" style="text-align: center;">Employer identification number</td></tr><tr><td style="width: 25px;">2</td><td style="width: 25px;">6</td><td style="width: 25px;"> </td><td style="width: 25px;"> </td><td style="width: 25px;">1</td><td style="width: 25px;">3</td><td style="width: 25px;">7</td><td style="width: 25px;">6</td><td style="width: 25px;">5</td><td style="width: 25px;">3</td></tr></table>			Social security number																				or										Employer identification number										2	6			1	3	7	6	5	3
Social security number																																																				
or																																																				
Employer identification number																																																				
2	6			1	3	7	6	5	3																																											
Part II Certification																																																				
Under penalties of perjury, I certify that:																																																				
1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and																																																				
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and																																																				
3. I am a U.S. citizen or other U.S. person (defined below); and																																																				
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.																																																				
Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.																																																				
Sign Here	Signature of U.S. person ▶ <i>Michael A. Stordahl</i>	Date ▶ <i>Jan. 7, 2019</i>																																																		
General Instructions																																																				
Section references are to the Internal Revenue Code unless otherwise noted.																																																				
Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9 .																																																				
Purpose of Form																																																				
An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.																																																				
<ul style="list-style-type: none">• Form 1099-DIV (dividends, including those from stocks or mutual funds)• Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)• Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)• Form 1099-S (proceeds from real estate transactions)• Form 1099-K (merchant card and third party network transactions)• Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)• Form 1099-C (canceled debt)• Form 1099-A (acquisition or abandonment of secured property)																																																				
Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.																																																				
If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.																																																				

Cat. No. 10231X

Form **W-9** (Rev. 10-2018)

5.7 Commission on Human Rights & Opportunities Contract Compliance Regulations

COMMISSION ON HUMAN RIGHTS AND OPPORTUNITIES CONTRACT COMPLIANCE REGULATIONS NOTIFICATION TO BIDDERS

(Revised 09/3/15)

The contract to be awarded is subject to contract compliance requirements mandated by [Sections 4a-60](#) and [4a-60a](#) of the Connecticut General Statutes; and, when the awarding agency is the State, [Sections 46a-71\(d\)](#) and [46a-81i\(d\)](#) of the Connecticut General Statutes. There are Contract Compliance Regulations codified at [Section 46a-68j-21 through 43](#) of the Regulations of Connecticut State Agencies, which establish a procedure for awarding all contracts covered by [Sections 4a-60](#) and [46a-71\(d\)](#) of the Connecticut General Statutes.

According to [Section 46a-68j-30\(9\)](#) of the Contract Compliance Regulations, every agency awarding a contract subject to the contract compliance requirements has an obligation to “aggressively solicit the participation of legitimate minority business enterprises as bidders, contractors, subcontractors and suppliers of materials.” “Minority business enterprise” is defined in [Section 4a-60](#) of the Connecticut General Statutes as a business wherein fifty-one percent or more of the capital stock, or assets belong to a person or persons: “(1) Who are active in daily affairs of the enterprise; (2) who have the power to direct the management and policies of the enterprise; and (3) who are members of a minority, as such term is defined in subsection (a) of [Section 32-9n](#).” “Minority” groups are defined in [Section 32-9n](#) of the Connecticut General Statutes as “(1) Black Americans . . . (2) Hispanic Americans . . . (3) persons who have origins in the Iberian Peninsula . . . (4) Women . . . (5) Asian Pacific Americans and Pacific Islanders; (6) American Indians . . .” An individual with a disability is also a minority business enterprise as provided by [Section 4a-60g](#) of the Connecticut General Statutes. The above definitions apply to the contract compliance requirements by virtue of [Section 46a-68j-21\(11\)](#) of the Contract Compliance Regulations.

The awarding agency will consider the following factors when reviewing the bidder’s qualifications under the contract compliance requirements:

- (a) the bidder’s success in implementing an affirmative action plan;
- (b) the bidder’s success in developing an apprenticeship program complying with [Sections 46a-68-1 to 46a-68-17](#) of the Administrative Regulations of Connecticut State Agencies, inclusive;
- (c) the bidder’s promise to develop and implement a successful affirmative action plan;
- (d) the bidder’s submission of employment statistics contained in the “Employment Information Form”, indicating that the composition of its workforce is at or near parity when compared to the racial and sexual composition of the workforce in the relevant labor market area; and
- (e) the bidder’s promise to set aside a portion of the contract for legitimate minority business enterprises. See [Section 46a-68j-30\(10\)\(E\)](#) of the Contract Compliance Regulations.

INSTRUCTIONS AND OTHER INFORMATION

The following [BIDDER CONTRACT COMPLIANCE MONITORING REPORT](#) must be completed in full, signed, and submitted with the bid for this contract. The contract awarding agency and the Commission on Human Rights and Opportunities will use the information contained thereon to determine the bidders compliance to [Sections 4a-60](#) and [4a-60a](#) CONN. GEN. STAT., and [Sections 46a-68j-23](#) of the Regulations of Connecticut State Agencies regarding equal employment opportunity, and the bidder’s good faith efforts to include minority business enterprises as subcontractors and suppliers for the work of the contract.

1) Definition of Small Contractor

[Section 4a-60g](#) CONN. GEN. STAT. defines a small contractor as a company that has been doing business under the same management and control and has maintained its principal place of business in Connecticut for a one year period immediately prior to its application for certification under this section, had gross revenues not exceeding fifteen million dollars in the most recently completed fiscal year, and at least fifty-one percent of the ownership of which is held by a person or persons who are active in the daily affairs of the company, and have the power to direct the management and policies of the company, except that a nonprofit corporation shall be construed to be a small contractor if such nonprofit corporation meets the requirements of subparagraphs (A) and (B) of subdivision [4a-60g](#) CONN. GEN. STAT.

2) Description of Job Categories (as used in Part IV Bidder Employment Information) (Page 2)

<p>MANAGEMENT: Managers plan, organize, direct, and control the major functions of an organization through subordinates who are at the managerial or supervisory level. They make policy decisions and set objectives for the company or departments. They are not usually directly involved in production or providing services. Examples include top executives, public relations managers, managers of operations specialties (such as financial, human resources, or purchasing managers), and construction and engineering managers.</p> <p>BUSINESS AND FINANCIAL OPERATIONS: These occupations include managers and professionals who work with the financial aspects of the business. These occupations include accountants and auditors, purchasing agents, management analysts, labor relations specialists, and budget, credit, and financial analysts.</p> <p>MARKETING AND SALES: Occupations related to the act or process of buying and selling products and/or services such as sales engineer, retail sales workers and sales representatives including wholesale.</p> <p>LEGAL OCCUPATIONS: In-House Counsel who is charged with providing legal advice and services in regards to legal issues that may arise during the course of standard business practices. This category also includes assistive legal occupations such as paralegals, legal assistants.</p> <p>COMPUTER SPECIALISTS: Professionals responsible for the computer operations within a company are grouped in this category. Examples of job titles in this category include computer programmers, software engineers, database administrators, computer scientists, systems analysts, and computer support specialists</p> <p>ARCHITECTURE AND ENGINEERING: Occupations related to architecture, surveying, engineering, and drafting are included in this category. Some of the job titles in this category include electrical and electronic engineers, surveyors, architects, drafters, mechanical engineers, materials engineers, mapping technicians, and civil engineers.</p> <p>OFFICE AND ADMINISTRATIVE SUPPORT: All clerical-type work is included in this category. These jobs involve the preparing, transcribing, and preserving of written communications and records; collecting accounts; gathering and distributing information; operating office machines and electronic data processing equipment; and distributing mail. Job titles listed in this category include telephone operators, bill and account collectors, customer service representatives, dispatchers, secretaries and administrative assistants, computer operators and clerks (such as payroll, shipping, stock, mail and file).</p>	<p>BUILDING AND GROUNDS CLEANING AND MAINTENANCE: This category includes occupations involving landscaping, housekeeping, and janitorial services. Job titles found in this category include supervisors of landscaping or housekeeping, janitors, maids, grounds maintenance workers, and pest control workers.</p> <p>CONSTRUCTION AND EXTRACTION: This category includes construction trades and related occupations. Job titles found in this category include boilermakers, masons (all types), carpenters, construction laborers, electricians, plumbers (and related trades), roofers, sheet metal workers, elevator installers, hazardous materials removal workers, paperhangers, and painters. Paving, surfacing, and tamping equipment operators; drywall and ceiling tile installers; and carpet, floor and tile installers and finishers are also included in this category. First line supervisors, foremen, and helpers in these trades are also grouped in this category.</p> <p>INSTALLATION, MAINTENANCE AND REPAIR: Occupations involving the installation, maintenance, and repair of equipment are included in this group. Examples of job titles found here are heating, ac, and refrigeration mechanics and installers; telecommunication line installers and repairers; heavy vehicle and mobile equipment service technicians and mechanics; small engine mechanics; security and fire alarm systems installers; electric/electronic repair, industrial, utility and transportation equipment; millwrights; riggers; and manufactured building and mobile home installers. First line supervisors, foremen, and helpers for these jobs are also included in the category.</p> <p>MATERIAL MOVING WORKERS: The job titles included in this group are Crane and tower operators; dredge, excavating, and lading machine operators; hoist and winch operators; industrial truck and tractor operators; cleaners of vehicles and equipment; laborers and freight, stock, and material movers, hand; machine feeders and offbearers; packers and packagers, hand; pumping station operators; refuse and recyclable material collectors; and miscellaneous material moving workers.</p> <p>PRODUCTION WORKERS: The job titles included in this category are chemical production machine setters, operators and tenders; crushing/grinding workers; cutting workers; inspectors, testers sorters, samplers, weighers; precious stone/metal workers; painting workers; cementing/gluing machine operators and tenders; etchers/engravers; molders, shapers and casters except for metal and plastic; and production workers.</p>
--	--



3) Definition of Racial and Ethnic Terms (as used in Part IV Bidder Employment Information) (Page 3)

<p><u>White</u> (not of Hispanic Origin)-All persons having origins in any of the original peoples of Europe, North Africa, or the Middle East.</p> <p><u>Black</u> (not of Hispanic Origin)-All persons having origins in any of the Black racial groups of Africa.</p> <p><u>Hispanic</u>- All persons of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race.</p>	<p><u>Asian or Pacific Islander</u>- All persons having origins in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent, or the Pacific Islands. This area includes China, India, Japan, Korea, the Philippine Islands, and Samoa.</p> <p><u>American Indian or Alaskan Native</u>- All persons having origins in any of the original peoples of North America, and who maintain cultural identification through tribal affiliation or community recognition.</p>
--	---

BIDDER CONTRACT COMPLIANCE MONITORING REPORT

PART 1 – Bidder Information

Company Name: International Consulting Acquisition Corp. (ICAC) d/b/a Street Address: 2187 Atlantic Street City & State: Stamford, CT 06902 Chief Executive: Michael Connors	Bidder Federal Employer 26-1376530 Identification Number: Or Social Security Number:
Major Business Activity: ISG is a leading global technology research and advisory firm that helps corporations, public sector organizations and service and technology providers achieve operational excellence and faster growth. A trusted business partner to more than 700 clients, including 75 of the top 100 enterprises in the world, ISG specializes in digital transformation services, including robotics process automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; technology strategy and	Bidder Identification (response optional/definitions on page 1) -Bidder is a small contractor? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> -Bidder is a minority business enterprise? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> (If yes, check ownership category) Black <input type="checkbox"/> Hispanic <input type="checkbox"/> Asian American <input type="checkbox"/> American Indian/Alaskan Native <input type="checkbox"/> Iberian Peninsula <input type="checkbox"/> Individual(s) with a Physical Disability <input type="checkbox"/> Female <input type="checkbox"/> -Bidder is certified as above by State of CT? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Bidder Parent Company: Information Services Group (ISG) (If any)	
Other Locations in CT: None (If any)	

PART II - Bidder Nondiscrimination Policies and Procedures

1. Does your company have a written Affirmative Action/Equal Employment Opportunity statement posted on company bulletin boards? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	7. Do all of your company contracts and purchase orders contain non-discrimination statements as required by Sections 4a-60 & 4a-60a Conn. Gen. Stat.? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
2. Does your company have the state-mandated sexual harassment prevention in the workplace policy posted on company bulletin boards? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	8. Do you, upon request, provide reasonable accommodation to employees, or applicants for employment, who have physical or mental disability? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
3. Do you notify all recruitment sources in writing of your company's Affirmative Action/Equal Employment Opportunity employment policy? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	9. Does your company have a mandatory retirement age for all employees? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
4. Do your company advertisements contain a written statement that you are an Affirmative Action/Equal Opportunity Employer? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	10. If your company has 50 or more employees, have you provided at least two (2) hours of sexual harassment training to all of your supervisors? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/>
5. Do you notify the Ct. State Employment Service of all employment openings with your company? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	11. If your company has apprenticeship programs, do they meet the Affirmative Action/Equal Employment Opportunity requirements of the apprenticeship standards of the Ct. Dept. of Labor? Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input checked="" type="checkbox"/>
6. Does your company have a collective bargaining agreement with workers? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> 6a. If yes, do the collective bargaining agreements contain non-discrimination clauses covering all workers? Yes <input type="checkbox"/> No <input type="checkbox"/> 6b. Have you notified each union in writing of your commitments under the nondiscrimination requirements of contracts with the state of CT? Yes <input type="checkbox"/> No <input type="checkbox"/>	12. Does your company have a written affirmative action Plan? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> If no, please explain. 13. Is there a person in your company who is responsible for equal employment opportunity? Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> If yes, give name and phone number: Thomas Kucinski -



Part III - Bidder Subcontracting Practices

(Page 4)

1. Will the work of this contract include subcontractors or suppliers? Yes ☐ No ☒

1a. If yes, please list all subcontractors and suppliers and report if they are a small contractor and/or a minority business enterprise. (defined on page 1 / use additional sheet if necessary)

1b. Will the work of this contract require additional subcontractors or suppliers other than those identified in 1a. above? Yes ☐ No ☐

PART IV - Bidder Employment Information

Date: 7/23/2020

JOB CATEGORY *	OVERALL TOTALS	WHITE (not of Hispanic origin)		BLACK (not of Hispanic origin)		HISPANIC		ASIAN or PACIFIC ISLANDER		AMERICAN INDIAN or ALASKAN NATIVE	
		Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
Management	368	208	86	14	13	4	6	31	5	1	0
Business & Financial Ops	26	11	12	0	1				2		
Marketing & Sales	14	5	9								
Legal Occupations	4	2	2								
Computer Specialists	6	5		1							
Architecture/Engineering											
Office & Admin Support	14	3	9	2							
Bldg/ Grounds Cleaning/Maintenance											
Construction & Extraction											
Installation, Maintenance & Repair											
Material Moving Workers											
Production Occupations											
TOTALS ABOVE	432	234	118	17	14	4	6	31	7	1	
Total One Year Ago	439	238	130	15	12	5	8	25	6	0	
FORMAL ON THE JOB TRAINEES (ENTER FIGURES FOR THE SAME CATEGORIES AS ARE SHOWN ABOVE)											
Apprentices											
Trainees											

*NOTE: JOB CATEGORIES CAN BE CHANGED OR ADDED TO (EX. SALES CAN BE ADDED OR REPLACE A CATEGORY NOT USED IN YOUR COMPANY)



PART V - Bidder Hiring and Recruitment Practices

(Page 5)

1. Which of the following recruitment sources are used by you? (Check yes or no, and report percent used)				2. Check (X) any of the below listed requirements that you use as a hiring qualification (X)		3. Describe below any other practices or actions that you take which show that you hire, train, and promote employees without discrimination
SOURCE	YES	NO	% of applicants provided by source			
State Employment Service	<input type="checkbox"/>	<input checked="" type="checkbox"/>		X	Work Experience	
Private Employment Agencies	<input checked="" type="checkbox"/>	<input type="checkbox"/>		X	Ability to Speak or Write English	
Schools and Colleges	<input checked="" type="checkbox"/>	<input type="checkbox"/>			Written Tests	
Newspaper Advertisement	<input type="checkbox"/>	<input checked="" type="checkbox"/>		X	High School Diploma	
Walk Ins	<input type="checkbox"/>	<input checked="" type="checkbox"/>		X	College Degree	
Present Employees	<input checked="" type="checkbox"/>	<input type="checkbox"/>			Union Membership	
Labor Organizations	<input type="checkbox"/>	<input checked="" type="checkbox"/>			Personal Recommendation	
Minority/Community Organizations	<input type="checkbox"/>	<input checked="" type="checkbox"/>			Height or Weight	
Others (please identify)	<input type="checkbox"/>	<input type="checkbox"/>			Car Ownership	
	<input type="checkbox"/>	<input type="checkbox"/>			Arrest Record	
	<input type="checkbox"/>	<input type="checkbox"/>			Wage Garnishments	

Certification (Read this form and check your statements on it CAREFULLY before signing). I certify that the statements made by me on this BIDDER CONTRACT COMPLIANCE MONITORING REPORT are complete and true to the best of my knowledge and belief, and are made in good faith. I understand that if I knowingly make any misstatements of facts, I am subject to be declared in non-compliance with Section 4a-60, 4a-60a, and related sections of the CONN. GEN. STAT.

(Signature) <i>Nathan L. Frey</i>	(Title) Partner	(Date Signed) 7/23/2020	(Telephone) +1 512 970 0745
-----------------------------------	-----------------	-------------------------	-----------------------------

6 Appendix B – Detailed Resumes



Thomas Ortiz, PMP

Partner, Public Sector

Project Role: ERP Expert Advisory and Engagement Partner

ISG Role

Thomas Ortiz specializes in providing enterprise transformation, information technology, and project management services to state and local governments. His over twenty-five (25) years of experience includes services ranging from ERP procurement and selection advisory services, robotic process automation, Software-as-a-Service acquisition and evaluation, software system design, testing, implementation, business process reengineering, organizational redesign, change management, and Program Management Office operation. His background includes functional areas such as purchasing, e-procurement, inventory management, human resources, time and attendance, payroll, project accounting, licensing, and permitting. He has considerable experience in assisting state and local governments in evaluating and overseeing the implementation of ERP systems. He previously served as a senior manager in a Big 4 consulting firm. He has been with ISG for 14 years.

Experience

Thomas has advised numerous public sector clients on major enterprise transformation projects. He has led system requirement gathering efforts, advised on procurement strategy, authored the primary procurement documents (requests for proposal), facilitated the evaluation and selection process, and led contract negotiations with vendors. He has served as a primary advisor to project management, performed quality assurance on projects, led cultural change management efforts and directed training and transition efforts. He has led the creation of new organizations and the design and implementation of the related business processes. Thomas has also led several strategic planning efforts with clients in the definition of clear and compelling future state vision, mission, goals, and objectives.

Thomas is an accomplished and experienced project manager, directing engagements and advising clients such as the, City of Fort Worth, Texas, City of Jacksonville, Florida, City of Denton, Texas, City of Houston, City of San Antonio, Prince William County, VA, State of Washington, State of Idaho, State of Minnesota Texas Health and Human Services Commission, and Commonwealth of Kentucky. Through several major enterprise transformation projects, he has led the design and operation of program/project management offices creating the infrastructure, processes, and roles that have enabled clients to manage a portfolio of improvement projects and drive

towards the successful achievements of objectives. Thomas is certified Project Management Professional.

Across several engagements, Thomas has provided quality assurance and independent verification and validation services. He has developed assessment tools and approaches for major software projects and applied those tools to evaluate project progress and achievement of objectives, to review project documentation for adherence to required standards, to assess compliance with project processes, and to evaluate risks and mitigation plans.

Thomas possesses significant experience in business process, organizational change management, and training through the management and delivery of such services associated with most engagements. For a municipal client, he led the design and creation of a well-received series of videos as part of a marketing and training program for the new software application. In addition, he led the design and implementation of an enterprise system support organization through the definition of roles and responsibilities and the facilitation of discussions with the affected departments. Thomas also led the design and creation of a time entry and review group to manage the centralized entry, review, and approval of a 2,000-person municipal department. He also assisted in the design and implementation of revised procurement business processes for a state government that greatly improved purchasing cycle times and alignment of employees to roles within the division.

Representative Experience

Idaho State Controller's Office	City of Philadelphia, Pennsylvania
Idaho Department of Health and Welfare	City of Denton, Texas
Arizona Department of Administration	City of Fort Worth, Texas
Texas Health and Human Services Commission	City of Jacksonville, Florida
Texas Department of Transportation	City of Houston, Texas
Minnesota Departments of Finance and Administration	City of San Antonio, Texas
Commonwealth of Kentucky Finance and Administration Cabinet	Prince William County, Virginia
Ohio Department of Administrative Services	Oklahoma University Health Science Center
	Texas A&M University System

Education and Credentials

Thomas earned his Bachelor of Arts from Austin College and holds a Master of Public Affairs from the University of Texas. He completed an Organizational Development Certificate from the Master of Applied Industrial/Organizational Psychology program at Colorado State University. He is also certified as a Project Management Professional (PMP) by the Project Management Institute. Thomas currently serves on the Board of the Episcopal Health Foundation, a \$1 Billion-dollar foundation focused on the improvement of health and well-being of the 10 million people in the 57 counties of the Diocese of Texas.



Chuck Williams, PMP
Director, Public Sector
Project Role: Project Manager

ISG Role

Chuck Williams has extensive experience in local government Financial, HCM, and Budget Formulation systems integration. With more than 30 years of project management and ERP implementation experience, Mr. Williams offers proven expertise and leadership of local government implementation projects and production operations. Mr. Williams offers insights and creativity in project planning, requirements definition, RFP development and proposal review, solution architecture, business process analysis and design, change management, requirements traceability and verification, help desk, and projects focused on business process improvement and efficiency. He is a subject matter expert in financial management systems, budget formulation management systems and related processes, policy and procedure development, cost and effort estimation, project planning and scheduling and creative problem resolution.

ISG Experience

Description of Projects Supported

Industry: City Government, IN 2018 - 2020

Project Description/Scope: Full life-cycle multi-phase ERP implementation including financials, budget preparation, procurement and supplier and catalog management

Role: Microsoft Dynamics 365 ERP Engagement Manager

Responsibilities/Deliverables:

Management of customer relationship, consultant resources and deliverable schedule, delivery and quality.

Public sector business process subject matter expert.

Achievements:

- Provided public sector subject matter expertise in identifying and analyzing business needs and developing related project scope.
- Provided advice to customer regarding alternative budget preparation system approaches.
- Participated in Organizational Change Management processes including development of OCM approach and schedule.
- Conducted pre-implementation business process analysis by meeting with business representatives from all City departments, documenting business processes and



Chuck Williams, PMP

Director, Public Sector

Project Role: Project Manager

related issues, developed alternative approaches and identified new-system capabilities to enable implementation of new/revised business processes.

- Attained trusted advisor status in matters related to business processes and organizational issues related to the implementation.
- Delivered project within budget and on time.

Industry: Large County Government, OH 2018 - 2020

Project Description/Scope: Full life-cycle multi-phase ERP implementation including financials, budget preparation, procurement and supplier and catalog management

Role: Microsoft Dynamics 365 ERP Engagement Manager

Responsibilities/Deliverables:

Management of customer relationship, consultant resources and deliverable schedule, delivery and quality.

Public sector business process subject matter expert.

Achievements:

- Provided public sector subject matter expertise in identifying and analyzing business needs and developing related project scope.
- Provided advice to customer regarding alternative budget preparation system approaches.
- Participated in Organizational Change Management processes including development of OCM approach and schedule.
- Conducted pre-implementation business process analysis by meeting with business representatives from all County departments, documenting business processes and related issues, developed alternative approaches and identified new-system capabilities to enable implementation of new/revised business processes.
- Attained trusted advisor status in matters related to business processes and organizational issues related to the implementation.
- Delivered project within budget and on time.

Industry: City Government, IL 2004 - 2005

Project Description/Scope: Full life-cycle multi-phase ERP implementation including financials, budget preparation, procurement and supplier and catalog management



Chuck Williams, PMP
Director, Public Sector
Project Role: Project Manager

Role: PeopleSoft ERP Engagement Manager

Responsibilities/Deliverables:

Management of customer relationship, consultant resources and deliverable schedule, delivery and quality.

Public sector business process subject matter expert.

Achievements:

- Provided public sector subject matter expertise in identifying and analyzing business needs and developing related project scope.
- Provided advice to customer regarding alternative budget preparation system approaches.
- Participated in Organizational Change Management processes including development of OCM approach and schedule.
- Conducted pre-implementation business process analysis by meeting with business representatives from all City departments, documenting business processes and related issues, developed alternative approaches and identified new-system capabilities to enable implementation of new/revised business processes.
- Attained trusted advisor status in matters related to business processes and organizational issues related to the implementation.
- Delivered project within budget and on time.

Industry: Large County Government, MI 2003 - 2006

Project Description/Scope: Full life-cycle multi-phase ERP implementation including financials, human capital management, budget preparation, procurement, supplier and catalog management, and employee and manager self-service.

Role: PeopleSoft ERP Engagement Manager

Responsibilities/Deliverables:

- Management of customer relationship, consultant resources and deliverable schedule, delivery and quality.
- Public sector business process subject matter expert.

Achievements:

- Provided public sector subject matter expertise in identifying and analyzing business needs and developing related project scope.



Chuck Williams, PMP

Director, Public Sector

Project Role: Project Manager

- Provided advice to customer regarding alternative budget preparation system solutions resulting in custom development.
- Conducted pre-implementation business process analysis by meeting with business representatives from all County departments, documenting business processes and related issues, developed alternative approaches and identified new-system capabilities to enable implementation of new/revised business processes.
- Attained trusted advisor status in matters related to business processes and organizational issues related to the implementation.
- Delivered project within budget and on time.

Industry: *Large County Government, FL 1990 - 1992*

Project Description/Scope: Full life-cycle multi-phase ERP implementation including financials, budget preparation and procurement.

Role: AMS ERP Project Manager

Responsibilities/Deliverables:

- Management of consultant resources, project schedule, scope and staffing, and deliverable schedule, delivery and quality.
- Public sector business process subject matter expert.
- GL, AP, AR and budget preparation subject matter expert.

Achievements:

- Provided public sector subject matter expertise in identifying and analyzing business needs and developing related project scope.
- Conducted business process analysis by meeting with business representatives from many County departments, documenting business processes and related issues, developed alternative approaches and identified new-system capabilities to enable implementation of new/revised business processes.
- Configured and tested GL, AP, AR and budget preparation.
- Developed and implemented Fund Accounting Strategy.
- Defined and implemented a payables discount policy using system configuration and changes in business processes.
- Defined and implemented Month-end and Year-end Closing strategy.
- Delivered project within budget and on time.

Industry: *Large County Government, FL 1990 - 1992*



Chuck Williams, PMP

Director, Public Sector

Project Role: Project Manager

Project Description/Scope: Full life-cycle multi-phase ERP implementation including financials, budget preparation and procurement.

Role: AMS ERP Project Manager

Responsibilities/Deliverables:

- Management of consultant resources, project schedule, scope and staffing, and deliverable schedule, delivery and quality.
- Public sector business process subject matter expert.
- GL, AP, AR and budget preparation subject matter expert.

Achievements:

- Provided public sector subject matter expertise in identifying and analyzing business needs and developing related project scope.
- Conducted business process analysis by meeting with business representatives from many County departments, documenting business processes and related issues, developed alternative approaches and identified new-system capabilities to enable implementation of new/revised business processes.
- Configured and tested GL, AP, AR and budget preparation.
- Developed and implemented Fund Accounting Strategy and Month-end and Year-end Closing strategy.
- Developed and configured a fleet and work order solution to the County's unique approach to managing fleet charges and maintenance.
- Delivered project within budget and on time.

Industry: Large County Government, FL 1988 - 1990

Project Description/Scope: Full life-cycle multi-phase ERP implementation including financials, budget preparation and procurement.

Role: AMS ERP Project Manager

Responsibilities/Deliverables:

- Management of consultant resources, project schedule, scope and staffing, and deliverable schedule, delivery and quality.
- Public sector business process subject matter expert.
- GL, AP, AR and budget preparation subject matter expert.

Achievements:



Chuck Williams, PMP

Director, Public Sector

Project Role: Project Manager

- Provided public sector subject matter expertise in identifying and analyzing business needs and developing related project scope.
- Conducted business process analysis by meeting with business representatives from many County departments, documenting business processes and related issues, developed alternative approaches and identified new-system capabilities to enable implementation of new/revised business processes.
- Developed and implemented new decentralized budget preparation policies and procedures and configured the system to support the new processes.
- Configured and tested GL, AP, AR and budget preparation.
- Developed and implemented Fund Accounting Strategy and Month-end and Year-end Closing strategy.
- Delivered project within budget and on time.

Industry: State Department of Transportation 2016 - 2017

Project Description/Scope: Establishment of an implementation project governance structure and project charter, organization of business, technical and system module-focused workgroups, and project planning for a project stalled by lack of organization, continuity, and alignment of the solution with business needs.

Role: Project Director

Responsibilities/Deliverables: Advised to DOT leadership in designing launching a project governance structure that represented organization stakeholders and established a decision-making process that focused on integrated business processes and system modules rather than system modules alone, including:

- Collaborating with DOT leadership to define governance structure and identify stakeholders to be included in a project Steering Committee
- Design and implementation of the project governance structure providing support and advice to Steering Committee chair persons
- Development of a Project Charter tailored to the specific needs of the organization including definition of voting and non-voting membership and organizational decision-making processes
- Organization of a matrix work group structure that aligned business process needs with system capabilities and ensured that decisions in one business area would not encroach on decisions made in another area

Role: Solution Architect



Chuck Williams, PMP

Director, Public Sector

Project Role: Project Manager

Responsibilities/Deliverables: Designed and documented a two-phase approach for the scope of the solution to be implemented that would, in Phase 1, enable the Department of Highways to attain Federal Highway Administration certification for billing and reimbursement of federal funds and, in Phase 2 meet the Department of Highways non-federally funded project financial and project management needs, including:

- Collaboration with FHWA representatives to ensure project scope would be sufficient to attain certification
- Facilitation of business process and requirements confirmation workshops to validate existing business requirements and document requirements not previously included
- Review of legacy system business functionality to understand how the business requirements were being addressed
- Collaboration with the software vendor to identify the system modules that could be implemented to meet the business requirements and the related timing
- Facilitated an iterative solution scope design and review process with DOT and the vendor including modules to be implemented, integration of disparate legacy and new system modules, and timing and phasing of the implementation
- Produced final solution design and scope documentation and presented to the DOT Steering Committee and the State's ERP Board from which a decision to proceed was reached

Role: Finance Lead

Responsibilities/Deliverables: Facilitated workshops with the business area work groups for the Department of Motor Vehicles, State Transit Authority, State Rail Authority, State Aeronautics Board, State Port Authority and the Office of Administrative Hearings including Financial Reporting, Accounts Payable, Accounts Receivable, Purchasing, and Budget for the DOT agencies other than the Department of Highways to enable an accelerated implementation of the system for these agencies, including:

- Collaboration with the State's Finance Team Lead to organize workshops to identify and document business needs
- Facilitated workshops to identify training, reporting, conversion and integration requirements
- Recommended changes to business processes to enable more effective use of the new system and explained business functionality of the new system to provide a better understanding of how business processes would be completed
- Documented the implementation plan for the agencies other than DOH for the accelerated implementation



Chuck Williams, PMP
Director, Public Sector
Project Role: Project Manager

Industry: Statewide ERP Implementation Oversight 2012 - 2016

Project Description/Scope: Full life-cycle multi-phase implementation of CGI Advantage ERP including financials, treasury, procurement, grant accounting and billing, FHWA project accounting and billing, maintenance and work order, and human resources and payroll.

Role: Finance Lead in an IV&V capacity

Responsibilities/Deliverables: Lead State financials project team in a full life-cycle ERP implementation providing business process and implementation guidance, insight into system capabilities in the context of State business processes, vendor deliverable reviews, and production support, including:

- Provided finance team leadership supporting and representing the State in a wide variety of discussions with the vendor including:
 - Issue resolution activities
 - Discussions regarding severity of failed user acceptance test cases
 - Business process conflicts between the State’s requirements and delivered system functionality in the context of the vendor’s RFP responses to State business and technical requirements
- Functioned as a trusted advisor to the finance, treasury, procurement, human resources, payroll, transportation, enterprise readiness and change management functional and technical teams as well as the State’s PMO including:
 - Resolving State agency business process issues
 - Resolving integration issues
 - Facilitating discussions related to State and vendor interactions and relationships
 - Preparing communications for various audiences including the State Legislature, the Governor’s Cabinet Secretaries, Department Management, and end users
- Project plan management to ensure timely completion of tasks for which the State was responsible
- Business Process development including analysis of as-is business processes, business process requirements definition, development of to-be business processes, and development of the system-specific business process design documentation.
- Coordination of business process design review workshops to confirm that the State’s business requirements would be met under the proposed business processes.



Chuck Williams, PMP

Director, Public Sector

Project Role: Project Manager

- Recommended changes to vendor-designed conversions, interfaces, and enhancements to reduce complexity and effort while increasing effectiveness including:
 - Changes to conversion designs to provide more automated data preparation and conversion reducing the effort required of State users to convert the data
 - Changes to interface designs that significantly reduced the number and complexity of recurring correcting transactions to be entered by State users
 - Design of a preliminary payroll process not provided by the vendor
 - Design of a decentralized employee transfer process not provided by the vendor
 - DOT Pay Additive to allocate indirect costs to projects for FHWA billing purposes
 - Analyzed and provided oversight to a change in the vendor's overtime premium accounting to enable the premium to be directly charged to the project for which the overtime was earned rather than a general allocation across projects to which time was charged for a pay period
- Coordination of payroll to financials integration verification activities to ensure proper payroll accounting and accurate posting of payroll to grants and projects
- Provided verification and validation of the vendor's ability to meet more than 5,000 financials requirements including:
 - Tracing requirements to business process designs
 - Tracing requirements to integration test scripts for which the vendor was responsible

Industry: Large U.S. Federal Government Agency 2010 - 2012

Project Description/Scope: Full life-cycle multi-phase Public Budget Formulation implementation including budget formulation and budget execution in a multi-level review and approval environment in which major changes in base budgets and assumptions can occur at any time.

Role: SAP PBF Functional Lead

Responsibilities/Deliverables: Lead U.S. Federal Government Agency in a full implementation of Budget Formulation, Budget Execution, and Personnel Expenditure Planning of SAP PBF including:



Chuck Williams, PMP

Director, Public Sector

Project Role: Project Manager

- Project planning, scheduling and execution coordinating project team activities to ensure timely delivery of high-quality deliverables.
- Business Blueprint development including analysis of as-is business processes, business process requirements definition, development of to-be business processes, and development of the Business Blueprint document.
- Coordination of workshops and business process designs across PBF including Budget Forms and Personnel Expense Planning.
- Directly responsible for PBF Forms design and relate business process definitions.
- Significant participation in the design and business process definitions for PBF Personnel Expense Planning.
- Realization of Blueprint through design development and testing of the PBF Forms and processes to be implemented.
- Coordinated test plan development and execution.
- Coordinated customer staff configuration activities and data preparation.
- Provided guidance and subject matter expertise to developers during the development of PBF Forms, Planning Functions, and ABAP Processes.
- Coordinated final preparation of processes, data, and customer staff to implement the developed solution.
- Go-Live support of the new processes in a productive environment.

Achievements:

- On time delivery of project deliverables including:
 - SAP PBF Business Blueprint that has become the template for SAP PBF implementations
 - PBF Forms Functional Specifications
 - Steering Committee Presentations
 - Test Plans and scripts
- Worked with customer to define implementation scope based on the timing of their need for specific capabilities thereby reducing project and organizational stress.
- Participated in a thorough analysis of the customers HR master data which resulted in increased precision and accuracy of salary and benefit projections.
- Participated in the analysis of attrition and backfill requirements.
- Designed the PBF PEP process to enable calculation of Attrition and Backfill impacts.



Chuck Williams, PMP

Director, Public Sector

Project Role: Project Manager

- Became a true trusted advisor to the customer for all budget formulation and execution processes.

Industry: Large Independent School District, TX 2005 - 2006

Project Description/Scope: Full life-cycle multi-phase ERP implementation including financials, human capital management, budget preparation, procurement, and employee and manager self-service.

Role: PeopleSoft ERP Engagement Manager

Responsibilities/Deliverables:

- Management of customer relationship, consultant resources and deliverable schedule, delivery and quality.
- Public sector business process subject matter expert.

Achievements:

- Provided public sector subject matter expertise in identifying and analyzing business needs and developing related project scope.
- Conducted pre-implementation business process analysis by meeting with business representatives from district business operations departments, documenting business processes and related issues, developed alternative approaches and identified new-system capabilities to enable implementation of new/revised business processes.
- Successfully managed project team conflicts to ensure a productive project team environment.
- Delivered project within budget and on time.

Industry: Large Public Utility Company, MO 2004 - 2005

Project Description/Scope: ERP upgrade including financials and procurement.

Role: PeopleSoft ERP Engagement Manager

Responsibilities/Deliverables:

- Management of customer relationship, consultant resources and deliverable schedule, delivery and quality.
- Public sector business process subject matter expert.
- Overall project scope and schedule management.

Achievements:



Chuck Williams, PMP

Director, Public Sector

Project Role: Project Manager

- Provided public sector subject matter expertise in identifying and analyzing business needs and developing related project scope.
- Assisted customer with identifying and documenting in-scope/out-of-scope business processes to ensure project remained on schedule and within budget.
- Delivered project within budget and on time.

Industry: Large Research University, MN 1992 - 1994

Project Description/Scope: Full life-cycle ERP implementation including financials, budget preparation and procurement.

Role: AMS ERP Procurement and Budget Preparation Team Lead

Responsibilities/Deliverables:

- Public sector procurement business process subject matter expert.
- Budget execution subject matter expert.

Achievements:

- Provided public sector subject matter expertise in identifying and analyzing business needs and developing related project scope.
- Conducted business process analysis by meeting with business representatives from the University's Procurement and Budgeting departments, documenting business processes and related issues, developed alternative approaches and identified new-system capabilities to enable implementation of new/revised business processes.
- Designed and configured the budget execution system to enable the system to manage budgeted resources as cash rather than as planned expenditure3s as required by State law.
- Configured and tested procurement and budget execution.

Industry: Large County School District, MD 1986 - 1987

Project Description/Scope: Full life-cycle multi-phase ERP implementation including financials, budget preparation and procurement.

Role: AMS ERP Project Manager

Responsibilities/Deliverables:

- Management of consultant resources, project schedule, scope and staffing, and deliverable schedule, delivery and quality.
- Public sector business process subject matter expert.
- GL, AP, AR and budget preparation subject matter expert.

Achievements:

- Provided public sector subject matter expertise in identifying and analyzing business needs and developing related project scope.
- Conducted business process analysis by meeting with business representatives from many District business operations departments, documenting business processes and related issues, developed alternative approaches and identified new-system capabilities to enable implementation of new/revise business processes.
- Developed and implemented a new chart of accounts structure to enable segregated reporting of school activity funds, grant funds and District operating and capital funds.
- Assisted the District with negotiations with the County regarding implementation of a new electronic budget request and reporting process to enable the District to receive County funding faster and more accurately report the results of operations back to the County.
- Configured and tested GL, AP, AR and budget preparation.
- Developed and implemented Month-end and Year-end Closing strategy.
- Delivered project within budget and on time.

Industry: Large State Department, IL 1986 - 1987

Project Description/Scope: Full life-cycle multi-phase ERP implementation including financials, budget preparation and procurement.

Role: AMS ERP Project Manager

Responsibilities/Deliverables:

- Management of consultant resources, project schedule, scope and staffing, and deliverable schedule, delivery and quality.
- Public sector business process subject matter expert.
- GL, AP, AR and budget preparation subject matter expert.

Achievements:

- Provided public sector subject matter expertise in identifying and analyzing business needs and developing related project scope.
- Assisted the Department with negotiations with the State's procurement department regarding implementation of a new electronic purchase order process to enable the Department to submit purchase orders in a timelier manner and with greater accuracy.
- Configured and tested GL, AP, AR and budget preparation.
- Developed and implemented Month-end and Year-end Closing strategy.
- Delivered project within budget and on time.

Industry: Large State Department, IL 1988 - 1989

Project Description/Scope: Full life-cycle multi-phase ERP implementation including financials, budget preparation and procurement.



Chuck Williams, PMP

Director, Public Sector

Project Role: Project Manager

Role: AMS ERP Project Advisor

Responsibilities/Deliverables:

- State operating procedures subject matter expert.
- Public sector business process subject matter expert.

Achievements:

- Provided public sector and State operating procedures subject matter expertise in identifying and analyzing business needs and developing related project scope.
- Advised project team in the development of a new chart of accounts to enable compliance with internal and federal reporting while also satisfying the State's consolidated reporting requirements.

Industry: State Government 1987 - 1989

Project Description/Scope: ERP system support and maintenance.

Role: AMS ERP Functional Advisor

Responsibilities/Deliverables:

- Budget execution subject matter expert
- ERP business functionality subject matter expert.
- Public sector business process subject matter expert.

Achievements:

- Provided advice to the State's system support and maintenance group through the analysis of system issues, State business requirements and individual department business needs.
- Provided budget execution expertise in the maintenance and enhancement of a customized budget management system that relied upon a very complex system of annual and multi-year appropriations and multifaceted appropriation lapse and continuation rules.
- Designed and managed development of a bond fund application process to minimize federal penalties related to the timing with which State bond funds were applied to related projects.

**Education and
Credentials**

Chuck Williams is a certified Project Management Professional (PMP). He received his Bachelor of Arts in Accountancy from the University of Northern Iowa in 1982. He has received additional course work in Organizational Development and Change Management, Georgetown University, Washington, DC.

7 Appendix C – Detailed Solution Methodology

ISG’s ERP methodology has been developed and refined over our 23-year history, as we have focused on the planning, acquisition, and successful implementation of ERP systems for our public sector client. These services are the core focus of our business, and the methodology described below has been proven adaptable and effective to meet the needs of our city, county, state government, and higher education clients.

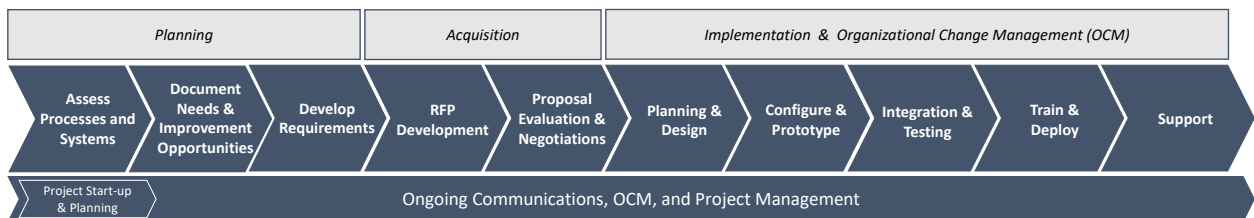


Figure 8: ISG ERP Methodology

The following content in Appendix C provides a detailed description of the ISG methodology that underpins the range of services requested in the City’s RFP.

Project Management

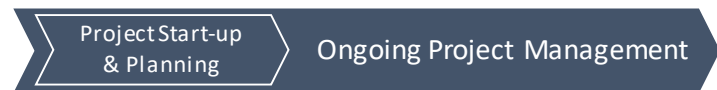


Figure 9: Project Management

Project Start-up

To ensure that ISG has a thorough understanding of the City’s goals and objectives for this initiative and a clear path of communication established with the project team, ISG will begin the project with a formal, structured planning process. The purpose of this phase is to:

- Establish, align and document expectations;
- Validate the City’s business goals and objectives;
- Formalize a detailed work plan that will guide ISG’s activities throughout the life of the project; and
- Prepare teams for business and technical data-collection efforts (e.g., interviews, surveys, workshops, etc.).

ISG’s methodology is based on the following key activities during this phase:

1. **Review of Strategic Goals and Objectives** – Although the City will benefit from ISG’s experience with other state and local governments, each project is unique. The City’s project goals establish the context in which ISG’s work will be accomplished. ISG will need to be informed of project history, strategic goals and objectives, key issues and needs, key stakeholders, and expectations. We will gain this information through the review of existing documentation and interviews with City leadership to establish business context and confirm objectives, schedule, and identify key stakeholders. This

step also ensures that there is strong alignment between the City's key stakeholders, which will be critical to a successful outcome for all.

2. **Establish a Partnership** – ISG's job is to be the City's advocate and to guide the City through territory that may be unfamiliar to the City but well known to ISG. To ensure achievement of desired outcomes, ISG and the City must form a well-integrated team, working together in close coordination and collaboration.
3. **Establish Project Management Standards** – ISG will apply a project management framework, which typically includes the following elements:
 - Roles and responsibilities;
 - Issue management and resolution process;
 - Risk management process;
 - Scope management process;
 - Communication process (e.g., status reporting, project updates);
 - Meeting protocols;
 - Workspace logistics; and
 - Standards for project administrative activities.
4. **Develop and Maintain a Detailed Work Plan** – The work plan for this effort will be organized in accordance with ISG's proposed methodology and approach aligned with the City's schedule. Each phase will be subdivided into activities, tasks, and sub-tasks, as appropriate. The schedule will show start and end dates and dependent relationships among tasks. Project milestones and deliverables will also be included in the schedule. The schedule will be prepared based on City input regarding staffing, timing, and other factors that will impact the project. The project schedule will be refined on an ongoing basis to reflect more detailed information as it becomes available and to track progress. ISG's standard tool for developing and maintaining project work schedules is Microsoft Project.
5. **Conduct Kickoff Meeting** – We will work with the project leadership in preparing for a project kickoff meeting to include City leadership, as well as key stakeholders and key project participants. During the kickoff meeting, ISG will provide information that explains the approach/methodology for the project, the project schedule, including the timing and level of involvement of City personnel.
6. **Status Reporting** – ISG will attend the weekly staff meeting with the Director of Administration. We will also provide, at a minimum, monthly status reports to the Director of Administration on the status of project activities, as well as any identified risks, opportunities or lessons learned. The report will provide, at a minimum:
 - Comprehensive status and health across all activities of the engagement;
 - Status of activities worked on and/or completed in the prior week and updates on scheduled tasks not completed;
 - Activities scheduled for the upcoming week and beyond;
 - Any issues, risks or concerns that may affect the success, scope or schedule of these procurement activities;
 - Significant items from the Risks, Assumptions, Issues, Dependencies (RAID) logs requiring attention from project management; and

- Staffing matters or concerns, as needed.

Ongoing Project Management

ISG utilizes a comprehensive project management approach for our engagements that systematically helps to ensure the successful and orderly completion of each aspect of project scope. Highlights of some of the key elements of our project management methodology and approach include the following:

- Our project management approach is based on best practices used in managing numerous large, enterprise engagements for our state and local government and higher education clients;
- The cornerstone of our approach is to work with the client to establish a robust project management framework; and
- Once this framework is established, we employ a structured, disciplined approach to managing the project that will yield high-quality products and services for our client.

During implementation, ongoing project management by ISG will be coordinated with the integration services provider. We expect management of ISG's portion of the project to require only minimal effort from the City's project manager.

Major components of our project management methodology are described in detail as follows:

Project Governance

A critical part of successful teamwork is the ability of key stakeholders and decision makers to reach consensus and make decisions around project goals, scope, budget, schedule and managing organizational change. This requires a strong governance process that includes strong executive and project leadership. Effective decision-making among project stakeholders is essential to the success of project efforts.

Deliverable Review and Acceptance

A key aspect of our quality assurance role is to assist project management with the quality review of all deliverables. Our approach is to have the structure of the basic content of each deliverable defined and approved by the ultimate approver for the City early in the deliverable-development cycle. When the final version of a deliverable is prepared and submitted for approval, we can coordinate the review process. This includes distribution to the appropriate reviewers, collection and consolidation of comments and making the changes necessary to gain acceptance.

Quality Assurance

One of the primary tasks we normally perform in these types of engagements is quality assurance reviews of work products. These reviews focus on ensuring that project effort meets the needs of the project. Our review of work products as well as project deliverables will ensure contract compliance, verify that it is complete and consistent with the scope of work and functionality documented in the contract, includes acceptable content and meets the City's standards of quality.

Planning

The Planning component is comprised of the following phases: Assess Process and Systems, Document Needs & Improvement Opportunities, and Develop Requirements. Each phase is described below:



Figure 10: Planning

Assess Processes and Systems

1. During the Assess Processes and Systems phase, ISG will conduct the following activities related to business process assessment:
 - Develop the Baseline List of In-Scope Business Processes and Priorities – Using ISG's Business Process Framework for ERP Systems, ISG will facilitate discussions with the City to identify and confirm the scope of processes and subprocesses that will be included in the scope of the project.
 - Review Existing Business Process Documentation – ISG will review existing business process documentation and organize the data based on ISG's ERP Business Process Framework and business process templates.
 - Conduct Discovery Sessions with Key Stakeholders – A series of discovery interviews will be held with key stakeholders as identified by the City. The purpose of these sessions is to obtain a better understanding of each in-scope business process and gather data for improvement opportunities, risks, and related information on reports, control points, and system interfaces.
 - The discovery sessions will also help in – (1) determining the order in which ERP functionality should be implemented; (2) deciding which supporting systems should be replaced by the new ERP system if a "big bang" approach (i.e., all functionality within scope goes live at all organization entities within scope all at one time) is not ultimately selected; and (3) identifying potential requirements for the new system.

Document Needs and Improvement Opportunities

The data gathered in the Assess Processes and Systems phase will provide the inputs for documenting of needs and improvement opportunities for the in-scope processes and sub-

processes. To complete the documentation of improvement opportunities, ISG will conduct the following activities:

- **Leading Practice Comparison** – ISG will assess the current business process documentation against leading practices inherent in ERP systems on the market today. This comparison will facilitate the identification of improvement opportunities by process and sub-process.
- **Identify System Duplication** – Using the results of the systems survey, ISG will identify process areas where multiple systems provide some or all business needs. System duplication present opportunities for rationalization with the implementation of a new ERP system.
- **Complete Process Overview** – Using ISG’s business process overview templates, ISG will consolidate the current state descriptions and improvement opportunities related to people, process, technology (including deployment model options), and business analytics.
- **Evaluate Delivery Options in a Hybrid Environment** – Depending on the in-scope processes there can be different implications in the choice of deployment model. ISG will provide an evaluation of the fit of the in-scope processes within the various deployment models available, as well as provide some of the operating risks associated with the models. The options include cloud (single and multi-tenant), hybrid, and on-premise deployment models.

Develop Requirements

The purpose of this phase is to build the City’s Requirements Register using input from the needs assessment and comparing those needs to ISG’s comprehensive repository of functional and technical requirements. The primary activities in this phase are the following:

1. **Conduct Finance and Business Capabilities Assessment and Validation** - ISG will compare the business capabilities identified by the City against the capabilities inherent in ISG’s SaaS ERP Differentiating Requirements Database to identify those that are considered standard features for the SaaS solutions as well as those that could be gaps. The assessment will also include identifying areas that may need clarification during the requirements development work sessions later in this phase.
2. **Build Schedule for Requirement Development Work Sessions** – ISG will use the information gathered from the previous activities to schedule and create agenda of work sessions to ensure the scope of the planned sessions covers all unique and critical requirements and produces the expected results.
3. **Develop Baseline Requirements Set** – ISG will develop an initial baseline set of differentiating Functional Requirements by analyzing the results from the Needs Assessment and Discovery phase against ISG’s Database of Differentiating Requirements.

Over the past few years, ISG has been at the forefront of ERP evaluations and selections that have focused on Software-as-a-Service/Cloud-based ERP platforms. Through the delivery of

services and its repository of data, ISG can identify those vital few areas and requirements that are unique and critical to the client and may be key differentiators between the systems.

4. **Conduct Work Sessions** – ISG will conduct facilitated Focus Group sessions with the City’s subject matter experts and technical staff that support existing administrative systems. Through these sessions, the City’s requirements are confirmed. In addition, ISG will capture perceived priority designations (“must have,” “should have,” and “nice to have”) for the City’s requirements set.

Acquisition

ISG will provide the services needed to support the City’s selection of ERP software and systems integration services. The specific services related to these areas are identified below:

- Development of a procurement strategy;
- Develop and document the evaluation process;
- Provide analysis of market conditions and potential bidders;
- Develop a comprehensive set of solicitation documents for software and services, including the Request for Proposals (RFP); and
- Support and guide the evaluation process from start to finish, including pre-proposal conference, vendor Q&A, proposal analysis, demonstrations and negotiations.

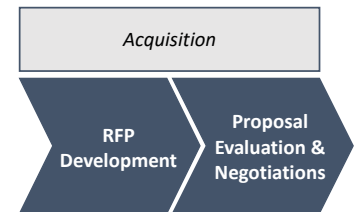


Figure 11: Acquisition

Procurement Strategy

ISG will work with the City to formulate a procurement strategy for acquiring the new ERP solution. The procurement strategy will answer important questions that help to build the framework for the RFP regarding the structure, content, timing, etc. Typical questions to be answered include:

- What process will be followed in developing and distributing the documents to vendors?
- What are the targeted dates for each major milestone in the procurement process?
- What set of functionality and services will be in scope?
- What criteria will be used to evaluate the proposals?

These strategy decisions will be documented in the comprehensive Evaluation Guide for the City’s approval.

Over the course of performing numerous ERP-related projects, our team has participated in evaluation and sourcing of every major Tier 1 ERP system available to the public sector, including solutions offered by CGI (AMS Advantage), Infor, Oracle (Oracle Cloud, PeopleSoft, and eBusiness), SAP, and Workday, as well as numerous middle-tier software providers. We have also worked closely with the major system integrators in this arena, as well as specialized boutique integration services providers.

Evaluation Process

ISG will facilitate the development of a comprehensive evaluation process, including selection criteria to be used in evaluating, and ultimately selecting, an ERP software solution and system integrator. ISG will document the evaluation process in a formal Evaluation Guide. The content of the Evaluation Guide will be developed based on City staff input and will leverage the ISG team's intellectual capital and prior experience (e.g., evaluation criteria, scoring/weighting framework). In developing an Evaluation Guide, ISG will document:

- Evaluation process flow, documenting each step;
- Evaluation criteria to be used in the selection process;
- Evaluation scoring system to be followed; and
- Evaluation committee membership and organization, including roles and responsibilities.

Request for Proposals

In accordance with the agreed-upon procurement strategy described above, ISG will work together with the project management and the procurement office to develop an RFP to acquire ERP software and services that best meets the City's business needs and strategic goals. Our goal is a set of solicitation documents that are:

- Clear – The vendor understands the scope of software and services needed by the City, and understands how to respond appropriately;
- Comprehensive – The documents provide background and adequately describe all scope desired for software and services so that the proposals received have not omitted any critical elements; and
- Comparable – The City scope and response format have been sufficiently defined so that the proposals may be compared on an "apples-to-apples" basis.

The RFP contents may include, but are not limited to, the following:

- Introduction (background, purpose, scope), including documentation of existing City administrative systems and key interfacing systems;
- RFP schedule of events;
- Pre-proposal conference information;
- Proposal format and content;
- Evaluation and contract award information;
- Vendor qualifications and experience;
- Narrative questions regarding software and services;
- Functional, technical and general requirements, in a response format;
- SaaS and/or hosting-specific requirements;

- Catalog of services required, including training requirements;
- Expected roles/responsibilities;
- Standard contract information (terms and conditions);
- Pro forma contracts, including a Model Statement of Work; and
- Cost information with associated narrative, typically as a separate response.

Evaluation Support

The purpose of this phase is to assist the Evaluation Committee in evaluating the proposals received in response to the City's RFP to acquire ERP Software. ISG's evaluation support services include:

- Assisting the City in conducting a pre-proposal conference for prospective vendors, including the development of presentation;
- Assisting the City in answering prospective vendor questions in accordance with RFP instructions;
- Providing orientation to the Evaluation Committee regarding the tools and techniques of evaluation process, as documented in the Proposal Evaluation Guide;
- Conducting an initial compliance review with the City's assigned procurement officer to determine that vendor proposals meet all minimum experience and administrative requirements as documented in the RFP;
- Assisting in the initial evaluation of vendor proposals, highlighting the strengths and weaknesses of each proposal, and preparing points for vendors to clarify, including a detailed cost/economic analysis of vendors' proposed costs – an "apples-to-apples" comparison of each vendor's proposed Total Cost of Ownership;
- Analyzing gaps in proposed implementation services or in software functionality, as noted in each vendor's response to the detailed functional requirements;
- Organizing the logistical details required for conducting software demonstrations or integrator interviews (e.g., meeting facilities, transmittal letters, instructions);
- Developing detailed demonstration/interview scripts that the vendor finalists must follow during their presentations;
- Facilitating vendor presentations, encompassing time management and vendor adherence to the script;
- Scheduling reference checks to verify representations and references made by the vendors. ISG provides templates to ensure thorough documentation of results;
- Assisting in the final scoring and calculation of scores to arrive at formal recommendation of award from the Evaluation Committee;
- If needed, assisting in the preparation of formal Request for Clarifications and/or Request for Best and Final Offers (BAFO); and
- Supporting contract negotiations with the awarded vendor.

Implementation & Organizational Change Management

ISG plays a hands-on role in providing independent project management and quality assurance services to our clients. We tailor our methodology during the implementation project to align with the phasing and activities of the selected systems integrator.

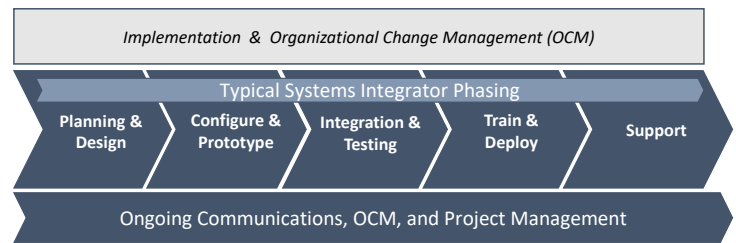


Figure 12: Implementation and OCM

While the systems integrator’s phasing and methodology may include different phases, the bulk of their underlying activities over the deployment lifecycle will be more similar than different to the “stage” construct described in the following pages.

We have included the following stage-by-stage description of ISG’s implementation oversight approach to provide a clear understanding of our activities as they align to the typical implementation life cycle used in modern cloud-based ERP implementation projects. ISG will adjust our planned oversight activities and approach to align with the specific methodology upon selection of the ERP software and systems integration vendor.

Note that throughout each stage, there is an underlying set of activities to ensure active communications to leadership, stakeholders, users, and affected external parties (e.g., vendors) of key information that they will need to fulfill their role in the project. Overall organizational change management activities to support business process change, configuration, conversion, and training and deployment activities are all necessary in each of the implementation stages. Lastly, ISG continues to plan a part in the ongoing project management activities, often as part of a Project Management Office (PMO), including client, integrator, and ISG project managers, and sometimes as the primary client project manager.

Plan Stage

The Plan Stage lays the foundation for work to be performed during the implementation project. ISG typically plays a key role in assisting in the review of planning documents, as well as creating the deliverable review templates for ISG’s deliverable review efforts, throughout the duration of the implementation.

ISG anticipates initiation of the following activities during the Plan stage, some of which will represent ongoing activities throughout the implementation:

- Development of Deliverable Review Verification Strategies – ISG works with client and integrator resources to support the creation of a Deliverable Expectations Document (DED) for vendor-produced project deliverables. This DED outlines includes content and level of detail, format (e.g., Word or PowerPoint), deliverable outline, and acceptance criteria. In addition, ISG creates a deliverable review report template that can be used for each key deliverable.

- Risk Management / Issue Management Process – ISG participates in initial meetings with the client and the integrator to define the project’s Risk Management and Issue Management process and framework as well as known risks and issues. Additionally, ISG confirms that a formal Risk Log and Issue Log are established, and processes are put in place to ensure that risks and issues are captured and tracked.
- Create QA Reporting Template – ISG creates a monthly quality assurance reporting template based on the validation elements described earlier in this section. Additionally, ISG provides recommendations for improvement and/or any potential “red flags” in upcoming project activities.
- Project Plan / Timeline and Resource Plan – We work with the City and the integrator in the review and finalization of the project plan. It is critical that City’s project executives understand and agree to the level of client support required throughout all project activities, with special emphasis on the resources required for proper testing of the new application.
- Scope Definition – ISG participates in early planning sessions to help to ensure that the project scope is clearly understood and agreed on by the client and integration partner and that it is documented as a baseline. Also, ISG helps to ensure that any changes in project scope that occur throughout the project are documented through a comprehensive change control process.
- Project Management Gap Analysis – Critical project management and reporting tools and techniques should be established during the Plan stage. We perform a gap analysis to verify that the proper project management processes are in place.
- Internal Controls Strategy – ISG participates in work sessions to discuss the system internal control strategies that will be employed to help ensure that client policies, procedures, and segregation of duties are taken into account during system design, configuration, and testing.

Design Stage

During this stage of the project, the systems integration vendor develops the “To Be” business processes in conjunction with the client project team. ISG’s traditional focus during this stage of the project is to monitor the efforts of the key design teams (both from a functional, technical, and project management perspective) and to serve as knowledge resources to our client. A critical task is to validate that new business processes address the needs of the client so that there are no costly changes after the software has been configured. During this stage, we traditionally will work jointly with client project resources, subject matter experts and integration partner consultants on the following project activities:

- Business Process Design – ISG participates in business process design workshops to verify that client business processes have been accounted for within the design. Additionally, ISG validates that the newly designed processes meet client needs as whole as well as the needs of the departments.

- Internal Controls – During the business process design sessions, ISG validates that the internal controls strategy developed in the Planning phase of the project are carried through into the design phase.
- System Integration / Data Conversion / Reporting Strategy – In conjunction with the development of business processes, ISG participates in system integration, data conversion, and reporting strategy workshops / discussions. We validate that the strategies being employed by integration partner are in the best interests of our client.
- Knowledge Transfer and Change Management – In this stage of the project, the groundwork is laid for successful adoption of the new solution. ISG reviews and validates both the knowledge transfer (e.g., the ability for our client to be self-sustaining once the new application is in production) and change management strategies and plans. Paramount in this review is the engagement strategy for client executives, stakeholders, and end users.

Configure & Prototype Stage

The Configure and Prototype Stage builds the new solution based on the specifications (e.g., business process designs) in the Design Stage. Prototyping allows the client to see the configured functionality to validate that the business processes function as designed. ISG traditionally supports this phase with the following activities.

- Configuration – ISG will work with functional project staff to validate that the configuration matches the solution design and that the configured business processes provide the business results expected.
- Unit Testing – ISG participates in the development of testing plans and test scripts that individually test each set of functionalities (e.g., general ledger, accounts payable) being configured. We validate that proper documentation exists for any issues uncovered during the testing process and that resolution plans are in place to fix any configuration defects.
- Prototype Review Sessions – ISG participates in prototype review sessions to validate that the system prototypes cover the functionality within the project scope. Additionally, we confirm that functionality gaps are identified, documented, and that resolution plans are created. We monitor these resolution plans until they have satisfactorily resolved the gaps identified.
- Data Conversion – ISG evaluates the data conversion processes to verify that legacy data is moved into the new application as planned. Furthermore, ISG confirms that proper data verification strategies are in place to assess data accuracy.
- Integration / Interface Development – The development of interfaces and integration points are critical to confirm that all client business processes operate effectively and efficiently; not just those that exist solely within the new application. ISG reviews the integration partner interface development methodology to confirm that the appropriate information (e.g., data structures, file formats, interface protocols) is captured within the integration / interface documentation.

- **Report Development** – The creation of the report inventory in the Design Stage will be used to monitor the development of reports in the Prototype Stage. ISG evaluates report development progress based on this report inventory and verifies that the reports created meet client needs.
- **Gap Resolution Development** – For those gaps that are not able to be closed by the configuration of the application, ISG validates that resolution plans are in place and monitored. Since some of the gap resolutions may involve additional project costs, it is imperative that these efforts be closely monitored and controlled. ISG assists client project management in monitoring progress of these resolutions.
- **Security** – ISG reviews and assesses the development of the security plan for the new application. Furthermore, we confirm the client security policies identified in the security plan are built into the security within the new application.
- **Knowledge Transfer / Change Management** – ISG monitors progress of both the knowledge transfer and organizational change management plans. Additionally, based on change readiness assessment, we offer recommendations as appropriate on future organizational change management efforts.
- **End-User Training** – During the Prototype Stage, the end-user training plan is finalized. ISG assesses the end-user training plan to verify that the approach takes into account curriculum development, facility logistics, staffing resources, participant scheduling, and a process by which training is evaluated for effectiveness. Additionally, ISG assesses the linkage of the proposed training to needs assessment activities used to determine the educational needs of the end users.

Integration & Testing Stage

In the Testing Stage, the City verifies and validates that the entire application solution meets the client's business. Inherent in the Test Stage is testing the solution as whole; that is testing the functional configuration developed in the Prototype Stage along with integration and interfaces, data conversion, report development, and security. Several types of testing (integration, user acceptance, and parallel) are completed during this stage. ISG traditionally supports our client in the phase by performing the following activities:

- **Test Plans / Test Scripts** – ISG participates in the development of testing plans and test scripts for integration testing and user acceptance testing. We confirm that proper documentation exists for any issues uncovered during the testing processes and that resolution plans are in place to fix encountered defects. Furthermore, we validate that test scripts include appropriate testing for internal controls and appropriate segregation of duties within business processes.
- **End-user Training** – During this phase, ISG monitors the development of end-user training curriculum based on end-user training plan. We evaluate the quality of the training materials being developed to confirm course materials are thorough and that the time frames for each course are appropriate. Additionally, we verify that each course contains an appropriate amount of "hands-on" activities so that the training replicates the daily jobs end users will be expected to perform.

- Post Go-live Training Support – As new employees enter the client organization in the future, they will need to receive training on the new solution. ISG assesses the strategy (and the client’s readiness to support it) for training end users post go-live.

Train & Deploy Stage

The Train & Deploy Stage of the project is where the new solution is placed into production and becomes the system of record. During this stage, ISG traditionally places emphasis on:

- System Cut-over – ISG reviews the cut-over plan to validate that all steps and processes are included for a smooth transition to the new application. This includes verifying that the cut-over plan has iterative testing and can be confidently repeated.
- Internal Controls – ISG reviews and assesses the Internal Controls Monitoring Plan for ongoing internal controls assessment and client monitoring. The purpose is to confirm that internal controls will be maintained (and can be verified) by client staff on an ongoing basis.
- Knowledge Transfer – As the new solution is getting ready to be placed into production, ISG assesses the level of preparedness of client staff to operate/sustain the new solution. This will be based on the Knowledge Transfer Plan previously developed in the Design Stage.
- Go-live Assessment – ISG conducts an overall assessment of the City’s readiness to “go-live” with the ERP solution and communicates significant concerns or perceived weaknesses to City project management and/or project sponsors.
- Post Go-live Support – Even when implementations go exactly as planned, end users will still have questions and need support. ISG assesses the strategy and plans for providing application support for end users.

Support Stage

After “go-live”, ISG traditionally assesses the support structure for the new solution, as well as providing a final Quality Assurance Report. This final QA report provides an overview of the implementation and documents lessons learned and recommendations for the client as it moves forward. Activities during the Support Stage traditionally include the following:

- System Documentation – ISG evaluates the accuracy and completeness of system documentation. We make any recommendations for corrective action prior to the integration partner closing out the project.
- End-user Training – While obtaining evaluation of end-user training immediately after it is delivered is important, we believe that end-user training should translate to job effectiveness. ISG assesses the evaluation of end-user training once project users have had the opportunity to perform daily job tasks in the system. ISG provides recommendations for modifying end-user training based in this level of evaluation.



- Post Go-Live Issue Analysis – ISG provides assistance in the analysis of post go-live issues. Based on the type, severity, and frequency of occurrence, ISG makes recommendations as appropriate.
- Process Standardization – Once the system is in production, ISG ascertains the level of process standardization throughout the client. Based on this analysis we will provide recommendations for further optimizing client business processes.