COMMONWEALTH OF VIRGINIA

STANDARD CONTRACT

Contract Number: VTS-2114-2024

This contract entered into this 28 day of September 2023 by Robert Ferrilli LLC hereinafter called the "Contractor" and Commonwealth of Virginia, Virginia Polytechnic Institute and State University called "Virginia Tech."

WITNESSETH that the Contractor and Virginia Tech, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:
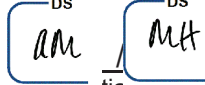
SCOPE OF CONTRACT: The Contractor shall provide Independent Validation and Verification Services to Virginia Tech as set forth in the Contract Documents.

PERIOD OF CONTRACT: From October 1, 2023 through September 30, 2026 with the option for two, one-year renewals.
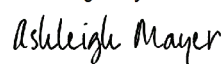
COMPENSATION AND METHOD OF PAYMENT: The Contractor shall be paid by Virginia Tech in accordance with the Contract Documents.
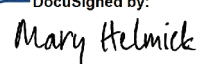
CONTRACT DOCUMENTS: The Contract Documents shall consist of this signed contract, Request for Proposal (RFP) number 351512402 dated July 24, 2023, together with Addendum Number 1 To RFP dated July 31, 2023, the proposal submitted by the Contractor dated August 3, 2023 and the negotiation summary, all of which Contract Documents are incorporated herein.

ELECTRONIC TRANSACTIONS: If this paragraph is initialed by both parties, to the fullest extent permitted by Code of Virginia, Title 59.1, Chapter 42.1, the parties do hereby expressly authorize and consent to the use of electronic signatures as an additional method of signing and/or initialing this contract and agree electronic signatures (for example, the delivery of a PDF copy of the signature of either party via facsimile or electronic mail or signing electronically by utilizing an electronic signature service) are the same as manual executed handwritten signatures for the purposes of validity, enforceability and admissibility

am   *MH*

(initials)

In WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound thereby.

Contractor
By: ___*Ashleigh Mayer*___
(Sig
Ashleigh Mayer   Account Executive
        Name and Title

Virgir
By: *Mary Helmick* _____

Mary W. Helmick
Director of Procurement

Request for Proposal #351512402

For

Independent Verification and Validation Services for ERP Technology Modernization Project

July 24, 2023

Note: This public body does not discriminate against faith-based organizations in accordance with the *Code of Virginia*, § 2.2-4343.1 or against a bidder or offeror because of race, religion, color, sex, sexual orientation, gender identity, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment.

RFP # 351512402, Independent Verification and Validation Services for ERP Technology Modernization Project

INCLUDE THIS PAGE WITH YOUR PROPOSAL, SIGNATURE AT SUBMISSION IS REQUIRED

DUE DATE: Proposals will be received until August 2, 2023   at 3:00 PM. Failure to submit proposals to the correct location by the designated date and hour will result in disqualification.

INQUIRIES: All inquiries for information regarding this solicitation should be directed to Procurement Officer, Emma Ruby, Phone: (540) 231- 9514, e-mail: emmaru97@vt.edu. All inquiries will be answered in the form of an addendum. Inquiries must be submitted by 3PM on July 28, 2023. Inquiries must be submitted to the procurement officer identified in this solicitation.

PROPOSAL SUBMISSION:

Proposals may NOT be hand delivered to the Procurement Office.

Proposals should be submitted electronically through Virginia Tech's procurement portal. This portal allows you access to view business opportunities and submit bids and proposals to Virginia Tech digitally and securely.

Proposals must be submitted electronically at:
https://bids.sciquest.com/apps/Router/PublicEvent?CustomerOrg=VATech

Vendors will need to sign up through this procurement portal, hosted by Jaggaer. **It is encouraged for all vendors to register prior to the proposal submission deadline to avoid late submissions**. Registration is easy and free. If you have any challenges with the registration process, please contact Jaggaer Support at 1-800-233-1121 or procurement@vt.edu. It is recommended to use Chrome as your browser.

Click on the opportunity and log in to your vendor account to begin preparing your submission. Upon completion, you will receive a submission receipt email confirmation. Virginia Tech will not confirm receipt of proposals. It is the responsibility of the offeror to make sure their proposal is delivered on time.

Hard copy or email proposals will not be accepted. Late proposals will not be accepted, nor will additional time be granted to any individual Vendor.

Attachments must be smaller than 50MB in order to be received by the University.

In compliance with this Request For Proposal and to all the conditions imposed therein and hereby incorporated by reference, the undersigned offers and agrees to furnish the goods or services in accordance with the attached signed proposal and as mutually agreed upon by subsequent negotiation.

AUTHORIZED SIGNATURE: _____ Date: _____

[INCLUDE THIS PAGE WITH YOUR PROPOSAL]

I.   PURPOSE:

This Request for Proposal (RFP) seeks to solicit proposals to establish a contract through competitive negotiations by Virginia Polytechnic Institute and State University (Virginia Tech), an agency of the Commonwealth of Virginia for Independent Verification and Validation Services for Virginia Tech's ERP Modernization Project.

Virginia Tech has been using Banner as its Enterprise Resource Planning (ERP) solution since 1997. We currently run Banner Finance, Human Resources, Student, and Financial Aid Administrative Pages on-premises on the latest Banner 9 release versions. Self-service (web) Banner for these areas currently is on Banner 8. Over the past 25 years, Banner has been upgraded many times. In addition, we have developed mods, created complete add-on applications, written many integrations, and implemented many additional commercial applications that all function together to create a customized Banner-centric ecosystem for university administrative processes.

The ERP Modernization Program consists of 6 projects to modernize its ERP solution:
- HR Banner Modernization
- Finance Banner Modernization
- Student Banner Redesign
- User Experience Modernization
- Business process Management Modernization
- Data reporting and Analytics Modernization.

As part of the oversight of this program required by Virginia's Information Technology Agency (VITA), the university wishes to engage the services of an independent service provider to provide best-in-class Independent Verification and Validation (IV&V) services.

The university is seeking services from a firm with end-to-end lifecycle experience in large higher education institutions having complex ERP systems that will provide senior university leadership with an independent verification and validation of the ERP Modernization Program based on the requirements listed within this RFP.

II.   SMALL, WOMAN-OWNED AND MINORITY (SWAM) BUSINESS PARTICIPATION:

The mission of the Virginia Tech supplier opportunity program is to foster inclusion in the university supply chain and accelerate economic growth in our local communities through the engagement and empowerment of high quality and cost competitive small, minority-owned, women-owned, and local suppliers. Virginia Tech encourages prime suppliers, contractors, and service providers to facilitate the participation of small businesses, and businesses owned by women and minorities through partnerships, joint ventures, subcontracts, and other inclusive and innovative relationships.

For more information, please visit: https://www.sbsd.virginia.gov/

III.   CONTRACT PERIOD:

The term of this contract is for three (3) year(s), or as negotiated. There will be an option for two (2) one-year renewals, or as negotiated.

IV.   EVA BUSINESS-TO-GOVERNMENT ELECTRONIC PROCUREMENT SYSTEM:

The eVA Internet electronic procurement solution streamlines and automates government purchasing activities within the Commonwealth of Virginia. Virginia Tech, and other state agencies and institutions, have been directed by the Governor to maximize the use of this system in the procurement of goods and services. *We are, therefore, requesting that your firm register as a vendor within the eVA system.*

There are transaction fees involved with the use of eVA. These fees must be considered in the provision of quotes, bids and price proposals offered to Virginia Tech. Failure to register within the eVA system may result in the quote, bid or proposal from your firm being rejected and the award made to another vendor who is registered in the eVA system.

Registration in the eVA system is accomplished on-line. Your firm must provide the necessary information. Please visit the eVA website portal at http://www.eva.virginia.gov/pages/eva-registration-buyer-vendor.htm and **register both with eVA and Ariba**. *This process needs to be completed before Virginia Tech can issue your firm a Purchase Order or contract.* If your firm conducts business from multiple geographic locations, please register these locations in your initial registration.

For registration and technical assistance, reference the eVA website at: https://eva.virginia.gov/, or call 866-289-7367 or 804-371-2525.

V.   STATEMENT OF NEEDS

Virginia Tech plans to contract for IV&V services to be provided on periodic basis as the need for the following services becomes necessary. We anticipate that the services will be tied to the different phases of the project and areas for review will be identified in advance of each review engagement requested.

In its proposal, offeror may provide other tasks for which it is proposing the University consider. It will be up to the discretion of the university to add those additional services to the contract beyond what is already listed below:

Phase of Project	Review Area	Task Description
Planning	Business Case	Review and evaluate the Business Case for the project to assess its reasonableness
Project Management	Project Sponsorship	Assess agency sponsor buy-in, participation, support and commitment to the project.
		Verify that open pathways of communication exist among all stakeholders.
		Verify that agency sponsor has bought-in to all changes that impact project scope, cost, schedule or performance.
	Management Assessment	Verify that lines of reporting and responsibility provide adequate technical, financial and managerial oversight of the project.
		Evaluate project progress, resources, budget, schedules and reporting.
		Assess coordination, communication and management, to verify agencies and departments are not working independently of one another.
	Project Management	Verify that a project management plan exists and that the plan is followed.
		Evaluate project reporting processes, procedures, and actual project reports to verify that project status is being accurately traced using project metrics

		Verify that milestones and completion dates are planned, monitored and met.
		Verify the existence and institutionalization of an appropriate project issue tracking mechanism that documents issues as they arise, enables communication of issue to proper stakeholders, documents a mitigation strategy as appropriate, and tracks the issue to closure.
		Determine if the project has remained within its approved scope.
		For each change in the approved scope of the project, verify the date the change was approved and by whom.
	Business Process Reengineering	Evaluate the project's ability and plans to redesign business processes to achieve improvements in critical measure of business performance, such as cost, service and speed.
		Verify that the reengineering plan has the strategy, management backing, resources, skills and incentives necessary for affective change.
	Risk Management	Verify that risk management processes and procedures exist and are being followed. Evaluate the project risk management processes and procedures to verify that risks are identified and quantified and that mitigation plans are developed, communicated, implemented, monitored, and complete.
	Communication Management	Verify that communication processes and procedures exist and are being followed. Evaluate the project's communication processes and procedures to verify they support communications and work project sharing between all project stakeholders, and assess if communication plans and strategies are effective, implemented, monitored and complete.
	Project Estimating and Scheduling	Evaluate the estimating and schedule process of the project to ensure that the project planning assumptions, budget, and resources are adequate to support the work-breakdown structure and schedule.
	Project Organization	Verify that lines of reporting and responsibility provide adequate technical, financial and managerial oversight of the project.
		Verify that the project's organizational structure supports training, process definition, risk management, quality assurance, configuration management, product testing and any other functions critical for the project's success.
Requirements Management	**Requirements Management**	Evaluate and make recommendations on the project's process and procedures for management requirements.
	Requirements Analysis	Verify that an analysis of user needs and objectives has been performed to verify that requirements of the system are well understood, well defined and satisfy any regulatory requirements.
		Verify that all stakeholders have been consulted to the desired functionality of the system, and that users have been involved in prototyping the user interface.
System Development	**Integration Testing**	Evaluate the plans, requirements, environment, tools, and procedures used for integration testing of system modules.
		Evaluate the level of automation and the availability of the integration test environment.
		Evaluate the plans, requirements, environment, tools, and procedures for interface testing of the system.

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		Evaluate the level of automation and the availability of the system test environment.
	Implementation	Review and evaluate implementation planning.
Operations	**Change Tracking**	Evaluate the system change request and defect tracking processes.

VI.   PROPOSAL PREPARATION AND SUBMISSION:

A. Specific Requirements

Proposals should be as thorough and detailed as possible so that Virginia Tech may properly evaluate your capabilities to provide the required services. Offerors are required to submit the following information/items as a complete proposal:

1. Include an Executive Overview of your proposal.
2. Submit the following information related to your firm's approach and methodology:
    a. A detailed explanation of your proposed solution and approach for IV&V services. Provide sample deliverables for your proposed solution in an appendix to your proposal.
    b. If any portion of the contract work will be performed by a subcontractor, indicate what areas that will be planned for and the percentage of contract work to be performed by a subcontractor.
    c. Provide detailed information on your proposed methodology.

3. Qualifications and Experience
    a. Include a brief history of your organization's qualifications and experience in providing IV&V services. Describe specific experience your firm has had with Higher Education and a "Modernization of ERP" project similar to the one Virginia Tech is currently undertaking.
    b. Provide the resumes for all your organization's key resources that will be assigned to this project (this information may be provided in an appendix to your proposal).
    c. Reference – submit at least three (3) references demonstrating same or similar solutions as proposed in your offer. Include Client Name, Client Contact Person, Contact's Email Address and brief summary of the project.

4. Business Proposal
    a. The University prefers cost proposals that are presented in fixed/flat fee offers all-inclusive of all expenses.
    b. In addition to the fixed/flat fee offer, please also submit an hourly rate that may be utilized if additional services, not originally within the scope of this RFP, may be to be provided.

5. Participation of Small, Women-owned and Minority-owned Business (SWAM) Business:

If your business cannot be classified as Small, Woman Owned or Minority owned business (SWaM), describe your plan for utilizing SWaM subcontractors if awarded a contract. Describe your ability to provide reporting on SWaM subcontracting spend when requested. If your firm or any business that you plan to subcontract with can be classified as SWaM, but has not been certified by the Virginia Department of Small Business and Supplier Diversity (SBSD), it is expected that the certification process will be initiated no later than the time of the award. If your firm is currently certified, you agree to maintain your

certification for the life of the contract. For assistance with SWaM certification, visit the SBSD website at http://www.sbsd.virginia.gov/

6. The return of the Proposal Submission Instruction (page 2 of this RFP) and subsequent addenda issued, if any, signed and filled out as required should be included in your proposal.

D. General Requirements

1. RFP Response: In order to be considered for selection, Offerors shall submit a complete response to this RFP to include;

   a. **One (1) electronic document** in WORD format or searchable PDF of the entire proposal as one document, INCLUDING ALL ATTACHMENTS must be uploaded through the Virginia Tech online submission portal. Refer to page 2 for instructions.

      Any proprietary information should be clearly marked in accordance with 2.d. below.

   b. Should the proposal contain **proprietary information**, provide **one (1) redacted electronic copy** of the proposal and attachments **with proprietary portions removed or blacked out**. This redacted copy should follow the same upload procedures as described on Page 1 of this RFP. This redacted copy should be clearly marked *"Redacted Copy"* within the name of the document. The classification of an entire proposal document, line item prices and/or total proposal prices as proprietary or trade secrets is not acceptable. Virginia Tech shall not be responsible for the Contractor's failure to exclude proprietary information from this redacted copy.

      No other distribution of the proposals shall be made by the Offeror.

2. Proposal Preparation:

   a. Proposals shall be signed by an authorized representative of the Offeror. All information requested should be submitted. Failure to submit all information requested may result in Virginia Tech requiring prompt submission of missing information and/or giving a lowered evaluation of the proposal. Proposals which are substantially incomplete or lack key information may be rejected by Virginia Tech at its discretion. Mandatory requirements are those required by law or regulation or are such that they cannot be waived and are not subject to negotiation.

   b. Proposals should be prepared simply and economically providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be on completeness and clarity of content.

   c. Proposals should be organized in the order in which the requirements are presented in the RFP. All pages of the proposal should be numbered. Each paragraph in the proposal should reference the paragraph number of the corresponding section of the RFP. It is also helpful to cite the paragraph number, sub letter, and repeat the text of the requirement as it appears in the RFP. If a response covers more than one page, the paragraph number and sub letter should be repeated at the top of the next page. The proposal should contain a table of contents which cross references the RFP requirements. Information which the offeror desires to present that does not fall within any of the requirements of the RFP should be inserted at an appropriate place or be

attached at the end of the proposal and designated as additional material. Proposals that are not organized in this manner risk elimination from consideration if the evaluators are unable to find where the RFP requirements are specifically addressed.

d. Ownership of all data, material and documentation originated and prepared for Virginia Tech pursuant to the RFP shall belong exclusively to Virginia Tech and be subject to public inspection in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by an Offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act.   However, to prevent disclosure the Offeror must invoke the protections of Section 2.2-4342F of the Code of Virginia, in writing, either before or at the time the data or other materials is submitted. The written request must specifically identify the data or other materials to be protected and state the reasons why protection is necessary. –The proprietary or trade secret material submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information.   The classification of an entire proposal document, line item prices and/or total proposal prices as proprietary or trade secrets is not acceptable and may result in rejection of the proposal.

3. Oral Presentation: Offerors who submit a proposal in response to this RFP may be required to give an oral presentation of their proposal to Virginia Tech.—This will provide an opportunity for the Offeror to clarify or elaborate on the proposal but will in no way change the original proposal.   Virginia Tech will schedule the time and location of these presentations. Oral presentations are an option of Virginia Tech and may not be conducted. Therefore, proposals should be complete.

VII.   SELECTION CRITERIA AND AWARD:

A. Selection Criteria

Proposals will be evaluated by Virginia Tech using the following:

Criteria	Maximum Point Value
1. Quality of products/services offered and suitability for the intended purposes	20
2. Qualifications and experiences of Offeror in providing the goods/services	30
3. Specific plans or methodology to be used to provide the Services	20
4. Cost (or Price)	20
5. Participation of Small, Women-Owned and Minority (SWAM) Business	10
Total	100

B. Award

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Selection shall be made of two or more offerors deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposal, including price, if so stated in the Request for Proposal. Negotiations shall then be conducted with the offerors so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each offeror so selected, Virginia Tech shall select the offeror which, in its opinion, has made the best proposal, and shall award the contract to that offeror. Virginia Tech may cancel this Request for Proposal or reject proposals at any time prior to an award. Should Virginia Tech determine in writing and in its sole discretion that only one offeror has made the best proposal, a contract may be negotiated and awarded to that offeror. The award document will be a contract incorporating by reference all the requirements, terms and conditions of this solicitation and the Contractor's proposal as negotiated.

Virginia Tech reserves the right to award multiple contracts as a result of this solicitation.

VIII.　INVOICES:

Invoices for goods or services provided under any contract resulting from this solicitation shall be submitted by email to vtinvoices@vt.edu or by mail to:

Virginia Polytechnic Institute and State University (Virginia Tech)
Accounts Payable
North End Center, Suite 3300
300 Turner Street NW
Blacksburg, Virginia 24061

IX.　METHOD OF PAYMENT:

Virginia Tech will authorize payment to the contractor as negotiated in any resulting contract from the aforementioned Request for Proposal.

Payment can be expedited through the use of the Wells One AP Control Payment System. Virginia Tech strongly encourages participation in this program. For more information on this program please refer to Virginia Tech's Procurement website: http://www.procurement.vt.edu/vendor/wellsone.html or contact the procurement officer identified in the RFP.

X.　ADDENDUM:

Any **ADDENDUM** issued for this solicitation may be accessed at http://www.apps.vpfin.vt.edu/html.docs/bids.php. Since a paper copy of the addendum will not be mailed to you, we encourage you to check the web site regularly.

XI.　COMMUNICATIONS:

Communications regarding this solicitation shall be formal from the date of issue, until either a Contractor has been selected or the Procurement Department rejects all proposals. Formal communications will be directed to the procurement officer listed on this solicitation. Informal communications, including but not limited to request for information, comments or speculations regarding this solicitation to any University employee other than a Procurement Department representative may result in the offending Offeror's proposal being rejected.

XII.　CONTROLLING VERSION OF SOLICITATION:

The posted version of the solicitation and any addenda issued by Virginia Tech Procurement Services is the mandatory controlling version of the document. Any modification of/or additions to the solicitation by the Offeror shall not modify the official version of the solicitation issued by Virginia Tech Procurement Services. Such modifications or additions to the solicitation by the Offeror may be cause for rejection of the proposal; however, Virginia Tech reserves the right to decide, on a case by case basis, in its sole discretion, whether to reject such a proposal.

XIII.   TERMS AND CONDITIONS:

This solicitation and any resulting contract/purchase order shall be governed by the attached terms and conditions, see Attachment A.

XIV.   CONTRACT ADMINISTRATION:

A. Vicki Hall, Director of Strategic and Operational Planning, Information Technology at Virginia Tech or their designee, shall be identified as the Contract Administrator and shall use all powers under the contract to enforce its faithful performance.

B. The Contract Administrator, or their designee, shall determine the amount, quantity, acceptability, fitness of all aspects of the services and shall decide all other questions in connection with the services. The Contract Administrator, or their designee, shall not have authority to approve changes in the services which alter the concept or which call for an extension of time for this contract. Any modifications made must be authorized by the Virginia Tech Procurement Department through a written amendment to the contract.

XV.   ATTACHMENTS:

Attachment A - Terms and Conditions

ATTACHMENT A

TERMS AND CONDITIONS

RFP GENERAL TERMS AND CONDITIONS

See:
https://www.procurement.vt.edu/content/dam/procurement_vt_edu/docs/terms/GTC_RFP_02182022.pdf

ADDITIONAL TERMS AND CONDITIONS

1. **ADDITIONAL GOODS AND SERVICES**: The University may acquire other goods or services that the supplier provides other than those specifically solicited. The University reserves the right, subject to mutual agreement, for the Contractor to provide additional goods and/or services under the same pricing, terms and conditions and to make modifications or enhancements to the existing goods and services. Such additional goods and services may include other products, components, accessories, subsystems, or related services newly introduced during the term of the Agreement.

2. **AUDIT**: The Contractor hereby agrees to retain all books, records, and other documents relative to this contract for five (5) years after final payment, or until audited by the Commonwealth of Virginia, whichever is sooner. Virginia Tech, its authorized agents, and/or the State auditors shall have full access and the right to examine any of said materials during said period.

3. **AVAILABILITY OF FUNDS**: It is understood and agreed between the parties herein that Virginia Tech shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this agreement.

4. **CANCELLATION OF CONTRACT**: Virginia Tech reserves the right to cancel and terminate any resulting contract, in part or in whole, without penalty, upon 60 days written notice to the Contractor. In the event the initial contract period is for more than 12 months, the resulting contract may be terminated by either party, without penalty, after the initial 12 months of the contract period upon 60 days written notice to the other party. Any contract cancellation notice shall not relieve the Contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation.

5. **CONTRACT DOCUMENTS**: The contract entered into by the parties shall consist of the Request for Proposal including all modifications thereof, the proposal submitted by the Contractor, the written results of negotiations, the Commonwealth Standard Contract Form, all of which shall be referred to collectively as the Contract Documents.

6. **IDENTIFICATION OF PROPOSAL**: Virginia Tech will only be accepting electronic submission of proposals. All submissions must be submitted to the Virginia Tech online submission portal. Upon completion you will be directed to your Submission Receipt. Virginia Tech will not confirm receipt of proposals. It is the responsibility of the offeror to make sure their proposal is delivered on time. **Attachments must be smaller than 50MB in order to be received by the University.** Proposals may **NOT** be hand delivered to the Procurement Office.

7. **NOTICES**: Any notices to be given by either party to the other pursuant to any contract resulting from this solicitation shall be in writing via email.

8. **SEVERAL LIABILITY:** Virginia Tech will be severally liable to the extent of its purchases made against any contract resulting from this solicitation. Applicable entities described herein will be severally liable to the extent of their purchases made against any contract resulting from this solicitation.

9. **CLOUD OR WEB HOSTED SOFTWARE SOLUTIONS**: For agreements involving Cloud-based Web-hosted software/applications refer to link for additional terms and conditions: http://www.ita.vt.edu/purchasing/VT_Cloud_Data_Protection_Addendum_final03102017.pdf

10. **ADVERTISING**: In the event a contract is awarded for supplies, equipment, or services resulting from this solicitation, no indication of such sales or services to Virginia Tech will be used in product literature or advertising. The contractor shall not state in any of the advertising or product literature that the Commonwealth of Virginia or any agency or institution of the Commonwealth has purchased or uses its products or services.

11. **PRICE ESCALATION/DEESCALATION**: Price adjustments for changes in the contractor's price of materials, labor and transportation may be permitted. Request for price adjustments for any other reasons will not be granted. No price increases will be authorized for 365 calendar days after the effective date of the contract. Contractor shall give not less than 30 days advance notice prior to the annual renewal of the contract of any desired price increase.

    The Contractor shall document the amount and proposed effective date of any general change in the price of materials, labor and transportation. Documentation shall be supplied with the contractor's request for increase which will (1) verify that the requested price increase is general in scope and not applicable just to Virginia Tech, and (2) verify the amount or percentage of increase which is being passed on to the contractor by the contractor's suppliers. Failure by the contractor to supply the aforementioned verification with the request for price increase will result in a delay of the effective date of such increase. The Virginia Tech Procurement Department may verify such change in price independently. The Virginia Tech Procurement Department may make such verification as it deems adequate. However, any increase which the Virginia Tech Procurement Department determines is excessive, regardless of any documentation supplied by the contractor, may be cause for cancellation of the contract by the Virginia Tech Procurement Department. The Virginia Tech Procurement Department will notify the contractor in writing of the effective date of any increase which is approved. However, the contractor shall fill all purchase orders received prior to the effective date of the price adjustments of the old contract prices.

    "Across the Board" price decreases are subject to implementation at any time and shall be immediately conveyed to Virginia Tech. The contractor is further advised that price decreases which affect the price of materials, labor, and transportation are required to be passed on to Virginia Tech immediately. Failure to do so will result in action to recoup such amounts.

12. **INSURANCE**:

    By signing and submitting a Proposal/Bid under this solicitation, the offeror/bidder certifies that if awarded the contract, it will have the following insurance coverages at the time the work commences. Additionally, it will maintain these during the entire term of the contract and that all insurance coverages will be provided by insurance companies authorized to sell insurance in Virginia by the Virginia State Corporation Commission.
    During the period of the contract, Virginia Tech reserves the right to require the contractor to furnish certificates of insurance for the coverage required.
    INSURANCE COVERAGES AND LIMITS REQUIRED:
    A. Worker's Compensation - Statutory requirements and benefits.
    B. Employers Liability - $100,000.00
    C. General Liability - $2,000,000.00 combined single limit. Virginia Tech and the Commonwealth of Virginia shall be named as an additional insured with respect to goods/services being procured. This coverage is to include Premises/Operations Liability, Products and Completed Operations Coverage, Independent Contractor's Liability, Owner's and Contractor's Protective Liability and Personal Injury Liability.
    D. Automobile Liability - $500,000.00

E.   Builders Risk – For all renovation and new construction projects under $100,000 Virginia Tech will provide All Risk – Builders Risk Insurance. For all renovation contracts, and new construction from $100,000 up to $500,000 the contractor will be required to provide All Risk – Builders Risk Insurance in the amount of the contract and name Virginia Tech as additional insured. All insurance verifications of insurance will be through a valid insurance certificate.

F.   The contractor agrees to be responsible for, indemnify, defend and hold harmless Virginia Tech, its officers, agents and employees from the payment of all sums of money by reason of any claim against them arising out of any and all occurrences resulting in bodily or mental injury or property damage that may happen to occur in connection with and during the performance of the contract, including but not limited to claims under the Worker's Compensation Act. The contractor agrees that it will, at all times, after the completion of the work, be responsible for, indemnify, defend and hold harmless Virginia Tech, its officers, agents and employees from all liabilities resulting from bodily or mental injury or property damage directly or indirectly arising out of the performance or nonperformance of the contract.

13. **RENEWAL OF CONTRACT**: This contract may be renewed by Virginia Tech for a period of 2, one-year renewals only under the terms and conditions of the original contract except as stated in A, B, C, & D below. Price increases may be negotiated only at the time of renewal. Written notice of Virginia Tech's intention to renew shall be given (approximately 90 days) prior to the expiration date of each contract period.
    A.   If Virginia Tech elects to exercise the option to renew the contract for an additional one-year period, the contract price(s) for the additional year shall not exceed the contract prices of the original contract increased/decreased by no more than the percentage increase/ decrease of the other goods and services category of the CPI-W section of the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.
    B.   If during the first one-year renewal Virginia Tech elects to exercise the option to renew the contract for the second additional one-year period, the contract price(s) for the second additional one-year period shall not exceed the contract price(s) of the first one-year renewal period increased/decreased by no more than the percentage increase/decrease of the other goods and services category of the CPI-W section for the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.
    C.   If during the second one-year renewal Virginia Tech elects to exercise the option to renew the contract for the third additional one-year period, the contract price(s) for the third additional one-year period shall not exceed the contract price(s) of the second one-year renewal period increased/decreased by no more than the percentage increase/decrease of the other goods and services category of the CPI-W section for the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.
    D.   If during the third one-year renewal Virginia Tech elects to exercise the option to renew the contract for the fourth additional one-year period, the contract price(s) for the fourth additional one-year period shall not exceed the contract price(s) of the third one-year renewal period increased/decreased by no more than the percentage increase/decrease of the other goods and services category of the CPI-W section for the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.

14. **SUBCONTRACTS**: No portion of the work shall be subcontracted without prior written consent of Virginia Tech. In the event that the contractor desires to subcontract some part of the work specified herein, the contractor shall furnish Virginia Tech the names, qualifications and experience of their proposed subcontractors. The contractor shall, however, remain fully liable and responsible for the work to be done by his subcontractor(s) and shall assure compliance with all requirements of the contract.

VIRGINIA POLYTECHNIC INSTITUTE AND STATE UNIVERSITY
PROCUREMENT DEPARTMENT

ADDENDUM NO. 351512402

DATE:	Monday, July 31, 2023
TO:	All Offerors
FROM:	Emma Ruby, Contracting Officer
TOTAL PAGE(S):	2 pages (not including attachments)
SOLICITATION TITLE:	Independent Validation and Verification – ERP Modernization Process
SOLICITATION NUMBER:	351512402

I. CLARIFICATIONS AND ADDITIONAL INFORMATION

Please note the due date for this solicitation is now Thursday, August 3rd at 3 PM.

II. REQUESTS FOR INFORMATION

1. Has Virginia Tech worked with other external consultants or vendors on prior stages of this ERP Technology Modernization Project? If yes, who and what was the nature of the work?

   Virginia Tech Response: Yes, Virginia Tech engaged the services of Moran Technology Consulting and The Tambellini Group during a 3 day workshop with the ERP working group to discuss strategic approaches and marketplace assessment of ERP software in higher education.

2. Was the RFP distributed to all vendors at the same time?

   Virginia Tech Response: All invited vendors were notified on Monday, July 24th.

3. Would vendors be penalized for going above a certain dollar amount in their cost proposals?

   Virginia Tech Response: Cost is part of the evaluation criteria and will be taken into consideration during evaluation.

4. Are vendors who are not SWaM certified required to partner with a SWaM subcontractor?

   Virginia Tech Response: No, there are no SWaM requirements to submit a proposal.

5. If a prime contractor is not SWaM certified but partners with a subcontractor who is SWaM certified, will points be given for Criteria #5 during evaluation?

   Virginia Tech Response: Majority Contractors can earn SWaM points based on the amount of SWaM subcontracting they provide in their subcontracting plan.

6. Will the RFP be available on the procurement website so that vendors can submit proposals electronically via the link included on page 2 of the RFP?

<u>Virginia Tech Response</u>: All invited vendors received an email invitation on Thursday, July 27th.

7. When will Virginia Tech publish answers to vendors' questions?

<u>Virginia Tech Response</u>: Virginia Tech will publish answers at least two days prior to the deadline. The deadline may be moved to allow two days between the addendum and deadline. The deadline is now Thursday, August 3rd at 3 PM.

8. Does the State's IV&V Process require specific documents or approaches?

<u>Virginia Tech Response:</u> No

9. Are there state-specific IV&V guidelines responders should be aware of?

<u>Virginia Tech Response:</u> No

10. Can we propose edits to the terms and conditions?

<u>Virginia Tech Response:</u> Virginia Tech may negotiate the terms and conditions with selected vendor(s).

11. Would Virginia Tech consider extending the deadline for proposals to allow time for vendors to respond to and incorporate information provided in the Q&A?

<u>Virginia Tech Response:</u> Virginia Tech will provide at least two days between posting the addendum and the deadline to submit proposals. The deadline was extended to Thursday, August 3rd at 3 PM.

12. Is this RFP under a master agreement or prequalification contract? If yes, which one?

<u>Virginia Tech Response:</u> This RFP will result in a contract with a dollar threshold of $200,000.

13. Should vendors scope out provide a price breakdown by project phase?

<u>Virginia Tech Response:</u> Vendors may provide pricing breakouts by phase.

14. Please confirm this engagement is for point-in-time IV&V work. If this is incorrect, please clarify the nature of the IV&V work requested.

<u>Virginia Tech Response:</u> This engagement is for point-in-time, but additional work may be required in the future.

15. What procurement does this RFP classify as? What is the dollar threshold for this method?

<u>Virginia Tech Response</u>: This is classified as an unsealed or informal request for proposals. The threshold is $200,000.

FERRILLI

Independent Verification & Validation Services for ERP Technology Modernization Project
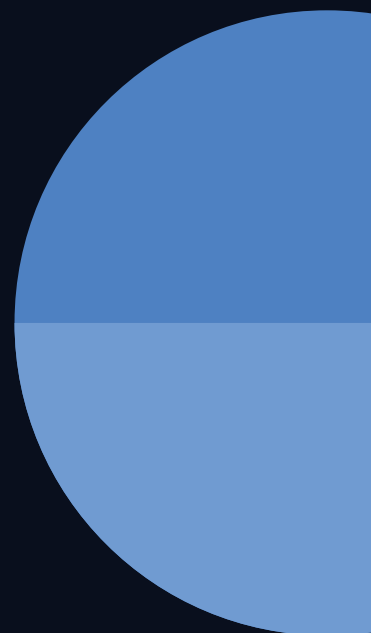
Virginia Tech

DIRECT ANY CORRESPONDENCE TO:

Jessica Bonelli

4 Kings Highway East

Haddonfield, NJ 08033

P: 888.864.3282 | F: 610.340.2969

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1. EXECUTIVE SUMMARY

Using its deep expertise in higher education technology modernization activities, including Ellucian Banner® modernization projects, Ferrilli will build a team to support this independent verification and validation effort that includes:

- CIOs with substantial executive leadership experience in leading and sponsoring significant projects impacting the organization.
- Project Management Professionals (PMP®) resources to verify the project management components of this effort.
- Prosci® Certified Change Management Professionals resources to verify the activities associated with the change management components of the plan.
- Ellucian Banner® functional experts with deep experience in Banner modernization, optimization, and transformation activities.
- Ellucian Banner® technical experts with deep experience with the challenges of supporting modernization efforts in a complex on-premise Banner environment.
- Ellucian Banner® developers with the skills and experience in the supporting the development aspects of modernization efforts.

These resources, led by the assigned Ferrilli leader, will be deployed efficiently at each stage of the verification and validation activity to ensure thorough and detailed evaluation and associated reports presentations.

The Ferrilli team will gather the needed baseline information associated with the project – including project expectations, strategic plan/direction, and associated design documents – to form the basis for the verification and validation work. The Ferrilli project lead will regularly interact with the project leadership team to ensure necessary information is gathered to ensure the verification and validation efforts.

Deliverables are proposed for each stage in the institution's outline expectations. These documents will be structured as appropriate for each phase within the agreed turnaround.

2. APPROACH & METHODOLOGY

The requirements for this RFP, as stated below, are within the expertise of the Ferrilli team members, who have extensive experience supporting institutions in the complex change described in this modernization program.

> "As part of the oversight of this program required by Virginia's Information Technology Agency (VITA), the university wishes to engage the services of an independent service provider to provide best-in-class Independent Verification and Validation (IV&V) services.

> The university is seeking services from a firm with end-to-end lifecycle experience in large higher education institutions having complex ERP systems that will provide senior university leadership with an independent verification and validation of the ERP Modernization Program based on the requirements listed within this RFP."

Ferrilli has the experience required to support the end-to-end lifecycle as described and the expertise to support senior leadership with independent verification and validation of the program. Supported by Ferrilli's technology agnostic perspective, deep expertise across technology platforms, commitment to strategic alignment, and

extensive experience with complex projects the Ferrilli is positioned to provide the unbiased review that independent verification and validation projects required.

As appropriate, the assigned project lead on this effort will call upon the breadth of Ferrilli resources to support those efforts. That expertise will include, but is not limited to, CIO level expertise on driving modernization efforts, executive advisors, PMP® Certified Project Managers, Prosci® Certified Change Managers, Ellucian Banner certified functional consultants, Ellucian Banner on-premise technical experts, Ellucian Banner developers, and other resources to provide the comprehensive verification and validation results required for this effort.

Approach

Independent verification and validation activities have, as a key outcome, ensuring that plans and deliverables align with and deliver to the project goals. As such the Ferrilli team will engage with the project leadership to ensure thorough understanding of those goals. Subsequent reviews will use those goals as a key metric. *Gathering this necessary information will take place through document review, conversations with the project leadership, and ongoing participation in project governance meetings.*

Verification will proactively include identifying any gaps plans that might impact delivering to the expected outcomes. In general, verification is an analysis of all plans against the goals and requires substantial knowledge of the expected outcomes, the typical path to those outcomes, and knowledge about the structure for delivery. The Ferrilli team will expect to see these documents in a timely and logical progression that allows for scaffolding of knowledge and feedback (as appropriate) and meaningful review and recommendations to the University. *Ferrilli will review plans provided, identify strengths and opportunities, as well as any gaps that may impact results.*

An example from Ferrilli's work: Reviewing complex vendor provided project plans for a multi-institutional move from a legacy ERP to a new, modernized SaaS ERP environment uncovered substantial gaps in the identification of client-side work effort. Upon conversation with the vendor, it became clear that the vendor saw their project plan as a resource management tool for the vendor's team and not as a client-side project management resource. Neglecting to fill that gap would have resulted in dissatisfaction with end results and the expenditure of institutional human and financial resources that did not achieve overall project goals. The institutional project leadership, with the Ferrilli team's support, was able to articulate this to the vendor and work with them to provide a comprehensive project plan that encapsulated all project resources and serves as the guiding tool for moving into the project with an accurate estimation of institutional level of effort and the platform from which to achieve the complex work in a compressed time frame.

Where appropriate, Ferrilli will use a toolkit of assessment vehicles to measure and benchmark along the way. The specific tools will be used and reported against with throughout the project lifecycle. Examples include measure of sponsor engagement (the primary success measure for this type of effort), resource availability, governance and decision-making transparency, and end user support. The best metrics for the right time in the project life cycle will be shared and validated with the project leadership team.

Validation provides the project leadership with assurance that the changes made through the effort meet the specified goals. The validation process should preclude the delivery of change that does not conform with the needed or desired project goals or user expectations. *Ferrilli will review the outcomes, as provided by the institution, to ensure results align with the requirements.*

An example from Ferrilli's work: without a clear validation process in place it is quite common to see a misalignment between what is delivered and user expectations. This is particularly evident in complex projects being delivered over a very short time frame. A simple, but significant, misalignment occurs when the technology is delivered to support a specific function and key users do not find it satisfactory. This dissatisfaction, in one

specific case, was the result of assumptions by the key users that they did not need to test the results. Expectations around testing and automation should have been clear, if a formal verification process was executed, but even within such a verified plan, the actual knowledge expectations and level of effort may not have been understood. In the specific case considered here, the Ferrilli resources stepped in to develop the systematic, sustainable, and repeatable testing plan. That type of consideration will be tested during the validation process.

Verification and Validation by Proposed Phase of Project

Phase of Project	Review Area	Task Description
Planning	**Business Case**	Review and evaluate the Business Case for the project to assess its reasonableness
*Ferrilli experienced technology leaders will evaluate the business case for reasonableness and use this business cases as the basis for subsequent verification and validation efforts. **Deliverable: Written Response. Optional briefing to leadership team.***		
Project Management	**Project Sponsorship**	Assess agency sponsor buy-in, participation, support and commitment to the project.
		Verify that open pathways of communication exist among all stakeholders.
		Verify that agency sponsor has bought-in to all changes that impact project scope, cost, schedule or performance.
*The Ferrilli team, using established benchmarks, will validate the sponsorship strength of the project. The most important success factor in organizational modernization and change is the visible leadership or project sponsors. **Deliverable: Written Response. Optional briefing to leadership team.***		
	Management Assessment	Verify that lines of reporting and responsibility provide adequate technical, financial and managerial oversight of the project.
		Evaluate project progress, resources, budget, schedules and reporting.
		Assess coordination, communication and management, to verify agencies and departments are not working independently of one another.
*The Ferrilli team will examine and verify, through document review and targeted interview, that the management structure is in place to ensure success. **Deliverable: Written Response. Optional briefing to leadership team.***		
	Project Management	Verify that a project management plan exists and that the plan is followed.
		Evaluate project reporting processes, procedures, and actual project reports to verify that project status is being accurately traced using project metrics
		Verify that milestones and completion dates are planned, monitored and met.
		Verify the existence and institutionalization of an appropriate project issue tracking mechanism that documents issues as they arise, enables communication of issue to proper stakeholders, documents a mitigation strategy as appropriate, and tracks the issue to closure.
		Determine if the project has remained within its approved scope.
		For each change in the approved scope of the project, verify the date the change was approved and by whom.

Phase of Project	Review Area	Task Description
The Ferrilli team will use its executive advisory expertise and its Project Management Professional (PMP)® Certified expertise to conduct the specified review. The Ferrilli team will provide expert and unbiased feedback on the plan and its representation of the work required to meet the project goals and expected outcomes. **Deliverable: Written Response. Optional briefing to leadership team.**		
	Business Process Reengineering	Evaluate the project's ability and plans to redesign business processes to achieve improvements in critical measure of business performance, such as cost, service and speed.
		Verify that the reengineering plan has the strategy, management backing, resources, skills and incentives necessary for affective change.
The Ferrilli team will use its expertise in leading and implementing business process change to conduct the specified review. Ferrilli's expertise in Ellucian Banner modernization will drive the review and allow Ferrilli to provide meaningful and thorough feedback to the project leadership. **Deliverable: Written Response. Optional briefing to leadership team.**		
	Risk Management	Verify that risk management processes and procedures exist and are being followed. Evaluate the project risk management processes and procedures to verify that risks are identified and quantified and that mitigation plans are developed, communicated, implemented, monitored, and complete.
The Ferrilli team will use its executive advisory expertise and its Project Management Professional (PMP)® Certified expertise to conduct the specified review. The Ferrilli team will provide expert and unbiased feedback to ensure risk management is thoroughly addressed. **Deliverable: Written Response. Optional briefing to leadership team.**		
	Communication Management	Verify that communication processes and procedures exist and are being followed. Evaluate the project's communication processes and procedures to verify they support communications and work project sharing between all project stakeholders, and assess if communication plans and strategies are effective, implemented, monitored and complete.
The Ferrilli team, supported by it Prosci® Certified Change Management Center of Excellence professionals, will carefully review the projects Communication Plans. Using research-based metrics for appropriate communication strategy and management, the team will provide feedback on the establish communication plan and provide recommendations for monitoring those plans. **Deliverable: Written Response. Optional briefing to leadership team.**		
	Project Estimating and Scheduling	Evaluate the estimating and schedule process of the project to ensure that the project planning assumptions, budget, and resources are adequate to support the work-breakdown structure and schedule.
The Ferrilli team will use its executive advisory expertise and its Project Management Professional (PMP)® Certified expertise to conduct the specified review. The Ferrilli team will provide expert and unbiased feedback on budgeting and resource management for the overall project. **Deliverable: Written Response. Optional briefing to leadership team.**		
	Project Organization	Verify that lines of reporting and responsibility provide adequate technical, financial and managerial oversight of the project.
		Verify that the project's organizational structure supports training, process definition, risk management, quality assurance, configuration management, product testing and any other functions critical for the project's success.

Phase of Project	Review Area	Task Description
The Ferrilli team will use its executive advisory expertise, Project Management Professional (PMP)® Certified, and its Organizational Change Management expertise to conduct the specified review. The Ferrilli team will provide expert and unbiased feedback on the organizational structure for the overall project. **Deliverable: Written Response. Optional briefing to leadership team.**		
Requirements Management	Requirements Management	Evaluate and make recommendations on the project's process and procedures for management requirements.
	Requirements Analysis	Verify that an analysis of user needs and objectives has been performed to verify that requirements of the system are well understood, well defined and satisfy any regulatory requirements.
		Verify that all stakeholders have been consulted to the desired functionality of the system, and that users have been involved in prototyping the user interface.
The Ferrilli team, using executive advisors and team members with deep expertise in the Ellucian Banner product and modernization efforts will verify prior assessment activities and ensure that the necessary consultation and results have been identified. **Deliverable: Written Response. Optional briefing to leadership team.**		
System Development	Integration Testing	Evaluate the plans, requirements, environment, tools, and procedures used for integration testing of system modules.
		Evaluate the level of automation and the availability of the integration test environment.
		Evaluate the plans, requirements, environment, tools, and procedures for interface testing of the system.
		Evaluate the level of automation and the availability of the system test environment.
	Implementation	Review and evaluate implementation planning.
The Ferrilli team, using executive advisors and team members with deep expertise in the technical aspects of implementing a modernization program, will conduct the needed reviews and provide feedback to support successful project outcomes. **Deliverable: Written Response. Optional briefing to leadership team.**		
Operations	Change Tracking	Evaluate the system change request and defect tracking processes.
The Ferrill team, using executive advisors and team members with deep expertise in the management of change requests and defect tracking will evaluate the proposed process for system change requests and defect tracking and provide feedback to support successful project outcomes. **Deliverable: Written Response. Optional briefing to leadership team.**		

The general deliverables are identified in the table above. These deliverables will be specific to each activity and include associated evaluation, benchmarks, and measures. Client is expected to provide the schedule with targeted review periods as part of the project planning effort. Ferrilli will seek to turnaround its review within 10 business days, with appropriate pre-planning to ensure Ferrilli can have the correct expertise available for the review. If this turnaround is not possible, for whatever reason, the Ferrilli project lead will work with the institution to determine delivery dates.

Ferrilli suggests adding an additional category to the project work: Organizational Change Management. Change management, in this context, is the "people side of change" and has been referenced in several sections above. Even with excellent participation and "buy-in" from user areas, the substantial changes expected in modernization projects requires a formal change management plan that parallels the technical project management described here. If this is in place, outside of the materials provided in this RFP, the Ferrilli team would expect to review this plan as part of the overall success benchmarking effort. If such a plan is not in place, Ferrilli strongly recommends it be added.

Ferrilli's change management expertise, supported by 20+ Prosci® Certified Change Management professionals organized in a Change Management Center of Excellence, informs this recommendation. Regardless of methodology, the team can support organizational and departmental change management efforts.

Additional notes
Ferrilli does not expect to subcontract work on this project.

Please see sample output documents, demonstrating the depth of the Ferrilli team's expertise, attached in Appendix A.

3. QUALIFICATIONS & EXPERIENCE

3.1   HISTORY

Robert Ferrilli launched the company in 2003 because he saw a need for IT service professionals who understand the unique needs of higher education. Since then, Ferrilli has grown into one of the nation's premier information technology consulting companies – having provided nearly 500 institutions throughout the United States(2 year, 4 year, private, public, medical schools, graduate schools, etc.) with strategy and support in all areas of higher education technology management and planning.

As an IT partner that serves higher education alone, Ferrilli focuses solely on innovations that enhance institutional efficiency and enrich the student, faculty, and staff experience. And as an IT partner that appreciates the diversity of the higher education landscape, Ferrilli takes the time needed to provide a solution that works for each unique environment. With no stake in a branded system or platform, Ferrilli is free to make recommendations that maximize the return on institutions' IT investments and drive lasting results.

Perhaps most important of all, Ferrilli understands that institutions' investments in IT are significant, and that failure is simply not an option. As such, it strives to build and maintain trust with every engagement – and stands behind that promise with a money-back satisfaction guarantee.

3.2   CREDENTIALS

Ferrilli is an end-to-end technology services company whose deep higher education experience enables it to deploy professionals who can precisely fill institutions' specialized requirements. Ferrilli's unparalleled expertise in higher education includes leadership, managed services, strategic consulting, change management, project management, customized solutions, and technology support services including:

- Student Information Systems (Ellucian Colleague, Ellucian Banner, Workday, Anthology, etc.)
- CRM implementation, integration, support, including Salesforce, Slate and Ellucian CRMs Recruit/Advise/Advance
- Assessments/Business Process Reviews
- Software development, integration, testing, and maintenance
- Hardware configuration, installation, and maintenance

- Database Administration
- Networking integration, management, and maintenance
- System administration
- Third party integration
- Information security (IS)
- Risk assessment
- IT training
- Microsoft support (MS SQL, SharePoint, Active Directory, ADFS, Office 365, InTune, etc.)
- Security, Cloud, and Infrastructure (CISO, DR, WVD, etc.)

3.3 WHY FERRILLI?

- Independent
- Higher Education Focused
- Team dedicated to Ellucian Banner Support
- Deep expertise in University modernization
- Results-Oriented
- Money Back Guarantee

At Ferrilli, we believe our deep knowledge of higher education combined with technical expertise places us in a unique position to serve the higher education industry. Most of our consultants come directly from higher education. Some have served as leaders in Enrollment, Financial Aid, Records & Registration and IT, and others have administered technology solutions supporting these areas. We have sat in your seat and wrestled with similar issues you face.

3.4 KEY PARTNERSHIPS

While Ferrilli is vendor agnostic, we work closely with the leading providers in higher ed tech today – leveraging key strategic partnerships to provide institutions with fully integrated support. When working with a client, we always provide the best fit solution regardless of our partnership status with the companies listed below. The partnerships allow us to have to advocate on behalf of our clients.

- Partnerships
  - Ellucian™ Platinum Partner
  - Salesforce Partner
  - Technolutions Slate Gold Partner
  - Microsoft Gold Partner
  - Cisco
  - Meraki
  - Oracle
  - Sharpspring
  - VMWare
  - Netskope
  - Varonis
  - Class link
  - Agile point
  - Webroot
  - Barracuda

- Veaam
- Graybar
- Blackbox
- CSD
- Lingk

3.5 EXPERIENCE

As described in the reference sections of this response, the Ferrilli team has been involved in many complex ERP modernization projects. Projects associated with Banner have included on-premise implementations that combine institutions and extend functionality in mature implementations; moves from on-premise to Managed Cloud implementations supporting both technical and functional transformation; and migrations from Colleague to Banner in the Ellucian Saas model. Characteristics of all of these efforts included technical modernization, functional modernization requiring substantial business process adjustments to establish administrative efficiency and improved student services, and organizational change requiring substantial organizational change management efforts. In collaboration with client partners, Ferrilli closed the gap between institutional technical and functional expertise, extended vendor expertise, and led institutional efforts to ensure adoption and utilization of the new environments. The Ferrilli team has specific expertise in aligning institutional strategy and expected outcomes from change with the project approach and metrics.

As executive advisors to institutional leaders, Ferrilli often evaluated complex plans to ensure thorough understanding of impact and identifying potential gaps, recommended and implemented extensions to the basics of vendor recommendations, and provided leadership and advice to ensure satisfactory completion on time and on budget. The leaders proposed to support this independent verification and validation work have been directly engaged in these other complex projects.

3.6 PERSONNEL

Since 2003, the Ferrilli team of higher education experts have been solving the unique challenges institutions face. We have a dynamic team of 150+ individuals with a variety of functional and technical expertise. Below are some of our staff's biographies. Their combination of skills will provide Virginia Tech with the experience necessary to be successful at providing the independent verification & validation services. While there are only a few team members' skills mentioned below, we have a full staff behind them that is available if needed.

Executive Leadership

Carol Thomas, Senior Vice President,

Mark Tuck, Executive Vice President

Delivery and Engagement Management

Steve Terry, Banner Practice Director:

Chris Giger, Associate Director:

Dr. Jenny Giron, Chief Information Officer:

Deborah Bennett, Chief Information Officer:

Project Management

The Ferrilli PMO is an adaptable unit that is well versed in both Waterfall and Agile methodologies. The Ferrilli PMO understands the importance of flexibility and responsiveness in managing projects and, with input from clients, strives to use the framework that are best suited to complete the project. Ferrilli PM's recognize that project requirements can evolve and change, and they have the expertise to seamlessly adjust plans and strategies accordingly.

The team has a deep understanding of Waterfall and various Agile methodologies like Scrum, SAFe, Kanban, and Lean and can tailor their approach to suit the specific needs of each project. They are adept at facilitating effective communication and collaboration among team members, stakeholders, and senior management, ensuring that everyone is aligned and working towards the same goals.

Greg MacPhee, Director PMO

Ellucian Banner Functional, Technical and Development Experts

Jay D. Banner Senior Technical Consultant:

████████████████████████

Linda B. Banner Functional Consultant.

████████████████████████
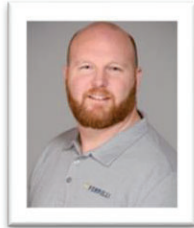
Dan W. Banner Functional Financial Aid Consultant:

████████████████████████

3.7   REFERENCES

Colorado State University

████████

CSU is a public research university in Fort Collins, Colorado. Colorado State University is classified among "R1: Doctoral Universities-Very high research activity." The University is the State's land grant university and the flagship university of the Colorado State University System. Ferrilli is providing a variety of technical and

functional consultant support to assist with many projects, including a multi campus implementation of Banner being structured using Banner's multi-entity processing(MEP) feature. The work, organized in the Ferrilli Flexpert model, spans 2 large institutions including the flagship university in Fort Collins. For Collins is providing the overall support for this large project and our work is with both the Banner project sponsors and leadership team, as well as with the information technology staff. Our responsibilities on this project have progressively increased with a large team in place supporting a board set of tasks, including but not limited to supporting MEP and quarterly Banner release testing, identifying customization to Banner, exploring hard coded values in Banner code, providing project resource management support, and working between the 2 institutions on data migration, third party integrations and overall planning. Ferrilli project leadership has identified possibilities for service consolidation and has done so, supporting he overall Joint Banner Project goals to streamline processing, consolidate staffing and improve services.

Arkansas State University System

Arkansas State University System was a 7-institution implementation and migration to the Ellucian Managed Cloud using the Shared Technology Platform. Each school was migrating from a standalone institutionally supported system (Colleague, Jenzabar and Campus Management) to one system, with central support and institutional management. Schools were in varying degrees of readiness, and all much to complete prior to the ERP go live. The complexity of this implementation was twofold: it was moving an entire state system to Ellucian Managed Cloud AND using one instance of Banner to support all the institutions making that move. As six of the seven institutions were approaching go-live, the Ferrilli team mobilized quickly and had a team of seven consultants on the ground within four days to provide triage and semester preparation. The group met on ground together in the State capital to establish expectations, ensure clear communication, and then dispersed throughout the state to provide on-ground support. This was the epitome of teamwork between the Ferrilli consultants, everyone involved at the six institutions, Banner Central support at the university, and Ellucian. The Ferrilli team provided both functional and technical support including support from our Banner Cloud practice, functional experts across student, financial aid, HR and Finance, as well as our knowledge of integrations (with Slate and other systems), compliance reporting and other important needs. Change management was supported, and a governance process proposed to help address some of the critical system-wide decisions still to be made. All schools went live in Fall 2022 on all modules of Banner. Ferrilli continued support for all schools through the first academic year – bringing up features such as Banner Communication Management (BCM) and Action Item processing (AIP) that just couldn't be done with the initial go live. The team continues to audit configurations and makes modifications for efficiency. The ASU System has extended Ferrilli services through 2026 to provide continued optimization and support for Banner.

Cincinnati State Technical & Community College

Ferrilli engaged with CState on a current state assessment. The objective for this assessment was to identify opportunities to identify related issues to replace necessary infrastructure, ensure system modernization (across all platforms), and develop streamline processing, improved automation, reduce the dependency on manual

interventions, and build the capability to continue improvements as Ellucian and other vendors release software that will advance Cincinnati State's mission.

As a result of the assessment, Ferrilli put together a path forward document on how best to achieve the goals of CState. The ERP modernization efforts spanned both infrastructure as well as application and database improvements. Ferrilli is in the midst of these modernization efforts, but has already seen significant improvements. Ferrilli has replaced the SAN, firewall and network switches. Additionally, Ferrilli moved Colleague from an on-premise AIX system to an AWS/Windows cloud hosting model.

From a Colleague perspective Ferrilli is modernizing the use of the software with the deployment of Self Service. Ferrilli has provided technical and functional resources over the course of this ERP Modernization project. Ferrilli de-customized CState's Ellucian Colleague ERP and transitioned the database from Unidata to a SQL Server. Ferrilli is working with all groups that interact with Ellucian Colleague to analyze business processes and any and all customizations. Business processes were analyzed by the team in order to get the most return on their software investment. Customizations were eliminated by adopting "in-the-box" solutions. The team also ran their SQL migration project and facilitated testing with the end-user community.

Southeast New Mexico College (SENMC)

SENMC became an independent community college in April 2022, twelve months after enabling legislation was passed to remove the College (then New Mexico State University – Carlsbad) from the New Mexico State University system. This resulted in massive organizational change. Moving to independence meant addressing every single aspect of the organization, including a complete rebuild of the technology environment. This is a story of change at all levels – an organization and its people, process, and technology. Identifying and addressing all the obvious and not so obvious regulatory, accreditation, compliance, technology, and financial requirements drove the change approach. It is also the story of community engagement, leadership, and unwavering support. While the situation might be unique, the interplay between relationships, community, regulations, accreditation, and leadership provides opportunities for learning about deep organizational change for any institution.

4. BUSINESS PROPOSAL

4.1   PRICING

This proposal is priced at a total do not exceed of $135,000. This is inclusive of any travel expenses that might be incurred during this engagement. The institution will be billed on a monthly basis.

4.2 FUTURE SERVICES

For future services outside of this initial requirement of the RFP, Ferrilli can offer a discounted rate of $225 per hour. To give Virginia Tech some examples of the type of competencies and expertise the team has around Banner, we have provided some information below.

Ferrilli has grown into one of the nation's premier information technology consulting companies – having provided nearly 500 institutions throughout the United States (2-year, 4-year, private, public, medical schools, graduate schools, R1 universities, etc.) with strategy and support in all areas of higher education technology management and planning.

Ferrilli supports many systems that are part of the higher education technology stack.
To provide some specific examples, Ferrilli resources are highly qualified to support and train on the following software, systems, and services:

- Ellucian Banner General
- Ellucian Banner Student
- Ellucian Banner Financial Aid
- Ellucian Banner Finance
- Ellucian Banner Human Resources
- Ellucian Banner Advancement
- Ellucian Self-Service Banner 8
- Ellucian Self-Service Banner 9
- Ellucian Banner Communication Management (BCM)
- Ellucian Banner Action Item Processing (AIP)
- Ellucian Workflow powered by Ethos
- Ellucian Analytics power by Ethos
- Ellucian Ethos Identity
- Ellucian Ethos Integration and API Development
- DegreeWorks
- Automic (formerly UC4 and AppWorx)
- LMS (Canvas, Moodle, etc)
- CRM (Salesforce, Slate, Ellucian CRM, Anthology CRM)
- Reporting(Cognos, Argos, PowerBI, etc.)
- ODS/EDW
- Banner Document Management
- Project management (PMP and Agile)
- Change management (Prosci®)
- Assessment and leadership

Additionally, we have provided a list of core competencies often required at other institutions that may become relevant to Virginia Tech in the future.

- Deep knowledge of Oracle Database technology and the Banner Database structure and architecture.

- Ability to write PL/SQL and execute queries against the Banner tables and update tables utilizing Banner packages
- Strong understanding of Banner packages and rules
- Ability to communicate with technical staff and departmental personnel on requirements definition, and the ability to translate requirement specifications into executable code
- Ability to provide task estimates and the ability to manage and adhere to a project plan.
- Understanding Banner integrations
- Deep understanding of deployment and testing in a test environment and working with Operations on Production deployments
- Ability to identify and document issues and follow up on resolution options
- Integration support with third-party systems, including the Banner ERP application Custom Development Services including but not limited to web application development in current industry leading languages.
- Functional knowledge for all Banner modules (includes Finance, HR, and Student)
- Architecting Identity and Access Management (IAM) solutions and integrating campus systems with single sign-on.
- Ability to manage and support a wide array of on-premises, hybrid, and cloud infrastructure including their compute, storage, networking, and security components.
- Experience in delivering security assessments and remediation assistance.

COMPETENCIES
Competency: Enterprise Resource Planning (ERP) Analysis and Development, Banner

The Ferrilli Banner practice provides a broad set of services associated with implementing, configuring, and optimizing the Banner environment. The team's work has also included efforts to de-customize Banner in preparation for improved student services or to prepare for a move to SaaS. Experience in the complexities of multi-entity processing, along with deep functional expertise across the entire Ellucian Banner suite, are representative of the team's skills. Examples of this work in complex organizations of the size and scale of Clemson U can be found in work completed at ASU, Colorado State University, and Colorado State University-Pueblo, among others. This competency is also recognized by Ferrilli's status as an Ellucian Platinum Partner and associated consultant certifications.

Competency: Programming
Included Languages
Oracle PL/SQL, SQL, Groovy, Grails, PageBuilder, Java, Javascript .NET and other tools used to support the Ellucian Banner platform. This list is a subset of the development expertise of the Ferrilli team.

The Ferrilli team includes developers familiar with many development platforms, including those that support the Banner environment, as well as other application platforms that may be in the University's portfolio.

Competency: Integration Support
The Ferrilli team works with colleges and universities around the country to support the necessary planning and implantation of integrations between Banner and other systems. This often involves developing definitions for source of truth in a complex data model, ensuring the business rules and logic are well understood, and coding and testing – in collaboration with users – to ensure the data movement is correct.

As there is no single standard for integrations, the Ferrilli team is adept with numerous approaches to integrations and their time. The team has expertise in writing the necessary extracts and uploads, applying best practice, and building test cases to support the approach each institution takes.

The Ferrilli team provides integration services, using several different approaches. Ferrilli's expertise in integration platforms includes:

- Boomi
- Informatica
- Jitterbit
- Axiom
- Lingk
- Ethos Integration and API tools

Competency: Oracle Database Administration

Ferrilli's Oracle Certified Professionals (OCPs) provide a comprehensive set of Oracle and Banner DBA services within RHLE environments. These DBAs are proficient in supporting complex Banner environments comprised of many optional Ellucian products such as Banner Document Management, Banner and Ellucian Workflow, DegreeWorks and the CRM Suite. In addition to DBA installs, Ferrilli DBAs can also assist with installations of Tomcat services with various Linux environments. Ethos and other integration platforms are part of the general Ferrilli DBA competency skills, as well as automation tools such as Automic.

Competency: Reporting

The Ferrilli team includes great expertise in the Ellucian ODS platform, along with several other commonly used reporting tools. Installing, configuring, and managing these products is an area of deep expertise.

The Ferrilli team provides reporting services across many reporting platforms. Core systems include, but are not limited to:

- Cognos
- ODS/EDW
- Evisions Argos
- Microsoft PowerBI
- Tableau
- JasperSoft
- PL/SQL, as appropriate

Competency: CRM

Ferrilli's partnership with Ellucian, Salesforce, and Technolutions has augmented the already strong team of professionals who support CRM Recruit/Advise/Advance, Salesforce & Slate at numerous colleges and universities. The Banner team and the CRM team work together to optimize integration between the two systems. The data management and data processing rules for such integrations require great collaboration and expertise to ensure success.

Competency: Functional Area Support

The Ferrilli team provides exceptional support for functional areas, whether that support is in how to use Banner, how to configure Banner, how to document and train, or how to interact with add-on systems. The functional expertise comes from team members who have served as registrars, bursars, human resource professionals, CFOs, budget directors, procurement managers, and nearly any other administrative function that relies on Banner to support its data and processing.

The team is adept at problem-solving as they are often asked to solve problems that have long plagued an institution, supporting change as often the solution is a change in practice, and meeting users where they are by understanding that the business of higher education is complex.

Ferrilli is proud to have three of the first Ellucian Certified Banner Student Consultants on the team. Access to the certification exams came as a result of Ferrilli's Platinum partnership with Ellucian. That partnership ensures that Ferrilli clients have consultants who have access to the most recent and most complete support from Ellucian.

Competency: Business Analysis

Business analysis is at the heart of many systems' improvements or acquisition decisions. The Ferrilli team has deep experience in analyzing business practices against institutional goals and objectives, identifying gaps, and recommending and executing to improvement strategies.

Competency: Business Process Improvement

Whether associated with a change in systems, strategy, or approach, the Ferrilli team is highly experienced in conducting business process reviews and identifying opportunities for adjustment in alignment with institutional goals. This work is often conducted when an institution is implementing either a change in technology platform, or in a reinvigoration effort of an existing platform. It has also been conducted as part of technology project where multiple institutions are coming together in one instance of Banner (using the Banner Multi-Entity Processing feature) and are seeking efficiencies through common practices, consolidate service delivery, or other streamlining efforts.

The business process improvement team is comprised of senior technology leaders, functional specialists (i.e., members with significant functional expertise at an institution including enrollment management, registrar, bursar, financial aid, human resource, finance and advancement experts). The team takes a holistic approach to change, always aligning with the institution's strategy and student success agendas. The deep higher education systems experience of the team allows the work to proceed quickly, once acclimated to the institution's expectations and goals.

Competency: Project Management

Ferrilli Project Managers have a strong understanding of project management methodologies and practices, allowing them to effectively apply varying approaches to a project. They possess exceptional leadership skills, as they are responsible for guiding project teams, aligning them with project goals, and fostering a collaborative and productive project environment. They excel in stakeholder management, actively engaging with stakeholders to understand their needs, provide regular updates, and address concerns promptly. The Ferrilli project managers possess excellent communication skills, allowing them to convey project objectives, progress, and risks to stakeholders, team members, and senior management. Moreover, they demonstrate strong problem-solving abilities, leveraging their analytical skills to identify and address challenges that arise during the project lifecycle.

Competency: Change Management

With any substantial change that impacts the way people work, the application of sound change management approaches can made the difference between success and failure, adoption and utilization, of the change. Senior members of the Ferrilli team are adept at applying the Prosci® change management approach, having become Prosci Certified Change Management professionals and applying that approach to complex projects. Sometimes this application is done through the development of a formal change management plan that aligns with the formal project management plan. Sometimes it is accomplished less formally, intertwining change management into the overall project methodology. Either way, the Ferrilli team's experience demonstrates the importance of understanding the people side of change in overall project success.
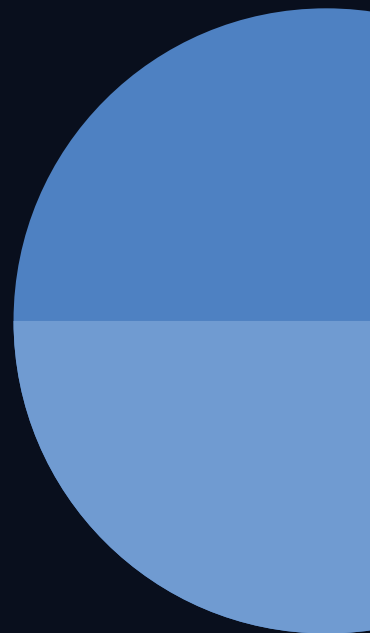
5. SWAM

Ferrilli is not classified as a SWAM business and does not anticipate utilizing any subcontractors for this work. Per the Q&A, SWAM certified was not a requirement of this bid.

FERRILLI

CLIENT FORMS

RFP # 351512402, Independent Verification and Validation Services for ERP Technology Modernization Project

INCLUDE THIS PAGE WITH YOUR PROPOSAL, SIGNATURE AT SUBMISSION IS REQUIRED

DUE DATE: Proposals will be received until August 2, 2023   at 3:00 PM. Failure to submit proposals to the correct location by the designated date and hour will result in disqualification.

INQUIRIES: All inquiries for information regarding this solicitation should be directed to Procurement Officer, Emma Ruby, Phone: (540) 231- 9514, e-mail: emmaru97@vt.edu. All inquiries will be answered in the form of an addendum. Inquiries must be submitted by 3PM on July 28, 2023. Inquiries must be submitted to the procurement officer identified in this solicitation.

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PROPOSAL SUBMISSION:

Proposals may NOT be hand delivered to the Procurement Office.

Proposals should be submitted electronically through Virginia Tech's procurement portal. This portal allows you access to view business opportunities and submit bids and proposals to Virginia Tech digitally and securely.

Proposals must be submitted electronically at:
https://bids.sciquest.com/apps/Router/PublicEvent?CustomerOrg=VATech

Vendors will need to sign up through this procurement portal, hosted by Jaggaer. **It is encouraged for all vendors to register prior to the proposal submission deadline to avoid late submissions** Registration is easy and free. If you have any challenges with the registration process, please contact Jaggaer Support at 1-800-233-1121 or procurement@vt.edu. It is recommended to use Chrome as your browser.

Click on the opportunity and log in to your vendor account to begin preparing your submission. Upon completion, you will receive a submission receipt email confirmation. Virginia Tech will not confirm receipt of proposals. It is the responsibility of the offeror to make sure their proposal is delivered on time.

Hard copy or email proposals will not be accepted. Late proposals will not be accepted, nor will additional time be granted to any individual Vendor.

Attachments must be smaller than 50MB in order to be received by the University.

</div>

In compliance with this Request For Proposal and to all the conditions imposed therein and hereby incorporated by reference, the undersigned offers and agrees to furnish the goods or services in accordance with the attached signed proposal and as mutually agreed upon by subsequent negotiation.
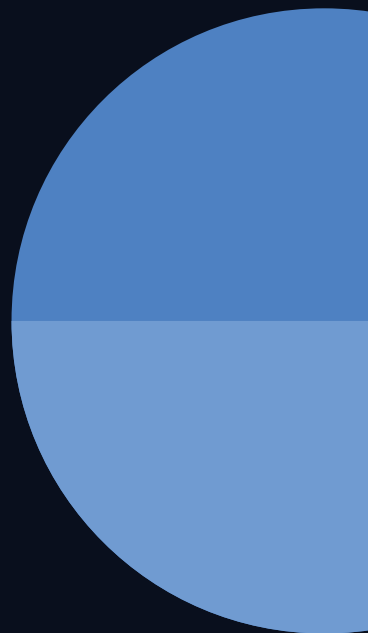
AUTHORIZED   SIGNATURE: _____ _____ Date: ___8/2/23_____

[INCLUDE THIS PAGE WITH YOUR PROPOSAL]

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APPENDIX A-SAMPLE OUTPUT

Outcomes
Over Tech

Ferrilli follows the outcome. Many firms can provide IT support. Fewer have the vision, capability, and knowledge to see the big picture: how the right technology can accelerate a path to true transformation and success.

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INFO@FERRILLI.COM | 888. 864. 3282 | FERRILLI.COM

Ferrilli - Negotiation Summary

1. As part of Virginia Tech standard procedures, all awarded contracts will be publicly posted on an online contracts portal. Is there any information included that would be used to identify or harm a person's identity, finances or personal information? If so, please provide a redacted copy - redacted copy attached

2. End of Contract Service Transition Expectations: If or when a transition of service to another provider is required (end of contract life or otherwise), the university would require the incumbent firm to cooperative fully in a successful transition of services. Explain any requirements your firm might have in preparing for such a transition of services. Additionally, please indicate your willingness to establish a transition plan alongside the new provider of service which may include but not be limited to sharing important data and/or existing service information via a cooperative knowledge transfer process.
Ferrilli approaches all work of this type as requiring a transition, usually at contract end with a transition back to the University. However, should that transition involve another party Ferrilli will fully cooperate. We will provide knowledge transfer through documentation as well as making available appropriate team members. If such a transition is outside of the normal contract expectations, we would asreasonable time to prepare for the transition.

3. Are the prices provided with your proposal as favorable (or more favorable) as pricing provided to other Higher Educational Institutions?
Favorable

4. Does Ferrilli agree to provide monthly invoices with payment due thirty (30) days after receipt of invoice or goods/services, whichever is later?
30 days after receipt of invoice

5. If awarded a contract, are you willing to hold prices firm for the initial contract period and the first renewal term?
Ferrilli will hold pricing for the initial contract and then would do an escalation for the renewal.

6. Are you registered with and willing to participate in the eVA internet procurement solution described in the terms and conditions of the RFP?
@Ashleigh Mayer?
we are registered and have agreed to their terms and conditions.

7. Are the prices for all goods/services listed in your proposal inclusive of all applicable eVA system transaction fees?
Yes, pricing is inclusive of all fees

8. Please describe Ferrilli's process for addressing any service-related issues.
Ferrilli takes customer service very seriously. We take immediate action when we know of a service-related issue. We seek to avoid issues by regular and consistent communication. Should action be required it will be taken. If that action does not solve the problem other options,

including up to a full refund of any payments, can be exercised. Our goal is to add value, and corrections will be made to ensure that happens.

As part of an endeavor of this type Ferrilli will provide an Engagement Manager who will be the main point of contact for organizing and delivering that work. Escalation within Ferrilli will be provided at the project kickoff with specific names and contact information. The client escalation path is Engagement Manager, first. Then, if necessary, the assigned Executive Director (usually a Corporate Vice President). Should satisfaction not be garnered at that point, then the Chief Client Officer followed by the Chief Executive Officer (Robert Ferrilli).

9. How soon after contract award can you begin providing services?

Generally, the Ferrilli team can being work within 14-30 days of contract signing.

10. Does the vendor acknowledge, agree, and understand that the terms and conditions of the RFP # 351512402 shall govern the contract if a contract is awarded to your company?

yes

11. Please describe your experience working within the Commonwealth of Virginia's information technology regulations and auditing requirements.

 Within the VA commonwealth schools we work with Christopher Newport University, Norfolk State University, and George Mason University

12. Please describe your experience working in a new state and learning their auditing requirements and regulations.

As part of the onboarding process to any new client, and specifically any new state system, the engagement manager and relevant project participants will request information relevant to the auditing process for the project. Because of the variability in how large technology projects are managed, understanding the nuances of these requirements and their impact on the overall program and project management is essential. The team will request access to relevant documentation, ask to speak with organizational subject matter experts and staff experienced in the auditing process to ensure compliance.

13. Has Ferrilli completed any work in the Commonwealth of Virginia previously?

Within the VA commonwealth schools we work with Christopher Newport University, Norfolk State University, and George Mason University

14. Has Ferrilli worked with any higher education institutes in the Commonwealth of Virginia previously?

Within the VA commonwealth schools we work with Christopher Newport University, Norfolk State University, and George Mason University

15. Could you please describe in greater detail Ferrilli's role in the projects listed as references in the proposal? Was your role in those projects implementation consulting or supporting?

CSU:

Ferrilli served as developers (backfilling in Information Technology), functional consultants (providing consulting, configuration, documentation, and training across the Banner Student, General, Accounts Receivable, and Financial Aid modules as well as SSB9), technical consultants providing guidance to the IT staff on the complexities of Multi-Entity Processing, working with Automic and Boomi for automations, addressing DBA complexity, and environmental cloning and management. Ferrilli also provided executive level consulting on project direction to the project leadership team, including the system CIO.

ASU:

Ferrilli has engaged in support the seven institutions that make up Arkansas State University as consultants and implementers, depending upon the needs of the institution. The system shares one instance of Banner in the Ellucian Managed Cloud. Six schools (5 community colleges and 1 regional university) went live last fall and were unprepared. The Ferrilli team members have provide consulting to the institutions with staff to complete the recommendations and completed the work on behalf of institutions that did not have the needed staff. While the overarching focus has been consulting, configuration, training, and documentation across multiple complex implementations, work has extended into governance design and enrollment management leadership, technical assistance on this complex Shared Technology Platform, and project-based work involving moving legacy SSB8 implementation at one institution up to SSB9, which was running at the other 6.

CinState: Leading assessment to determine fit gap and optimization needs; Colleague Modernization: project management, implementation consulting & support.

SENMC:

Ferrilli has provided all the needed CIO-level leadership, project staffing, and strategic direction setting for SENMC as they stood up an entirely new technology environment from the ground up. (As a result of separating from the New Mexico State University the College has less than on year to design and being the necessary implementations). Ferrilli analyzed the software environments provided by the University to determine what should be replaced, what was no longer needed, and what new technologies the College should embrace with independence. Ferrilli designed the network and data center infrastructure and implemented it. Ferrilli wrote security policies and implemented the security program. Ferrilli guided the numerous software applications purchases and implemented and supplemented vendor professional services with direct consulting and support for the small staff at the College. Ferrilli provided complete program management and individual project management for this massive effort.

16. What are the start and end dates for the projects included as references in your proposal?

CSU: 11/2019-present

ASU: 8/2022-present

CinState: Assessment 12/2020-4/2021; Colleague modernization: 6/2021-present

SENMC: 7/2021-present

17. Are the recommended additional services in your proposal included in your lump-sum pricing, or would these be additional at your proposed hourly rate?
We are not sure what you mean by additional services. The only thing we spoke about that was missing in your table was change management which was accounted for in the $135k. The list of future services is not in the $135k.

Ferrilli – Negotiation Summary

1. Cost to the University is a major component of this solicitation and one of the 5 factors considered during the award process. With this in mind, please submit your best and final pricing for consideration.

Ferrilli is offering $130k, non-inclusive of travel and $215/hr for work outside of this SOW.

Travel will be billed as needed on a monthly basis

2. If awarded a contract, do you agree to limit price increases to no more than the increase in the Consumer Price Index, CPI, "Other Goods and Services" for the latest twelve (12) months for which statistics are available at the time of renewal or 3 percent, whichever is less?

Ferrilli agrees to limit increases within CPI

3. Does Ferrilli agree to provide monthly invoices with payment due thirty (30) days after receipt of invoice or goods/services, whichever is later? Please answer in an affirmative or negative form.

Ferrilli agrees to provide monthly invoices with payment due 30 days after receipt of invoices or goods/services