

A Proposal for Washington State Department of Revenue

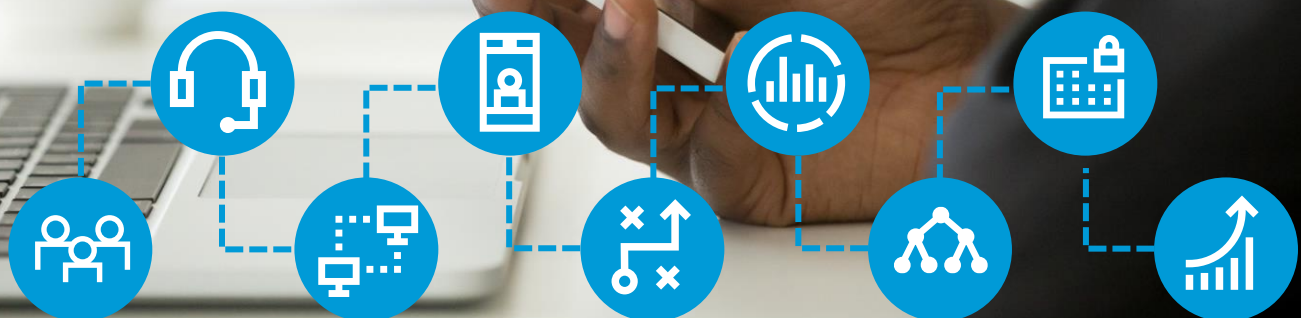
Gartner®

Feasibility Study for Next Generation Contact Center Platform

October 7, 2022

Engagement Number: 330080036 | Version 1

Solicitation Number: K2073



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October 7, 2022

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Jennifer Macinata
Solicitation Coordinators
Washington State Department of Revenue
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Tumwater, WA 98501
Telephone: +1 360 596 3782
Email: dorbidresponses@dor.wa.gov

Engagement Number: 330080036
Re: Proposal for Feasibility Study for Next Generation Contact Center Platform
Solicitation Number: K2073

Dear Ms. Heidi Whisman and Ms. Jennifer Macinata:

Gartner, Inc. (Gartner) is pleased to provide the Washington State Department of Revenue (DOR) with this Proposal in response to Request for Proposal (RFP) K2073: Feasibility Study for Next Generation Contact Center Platform. Gartner understands the importance of this effort in order for DOR to continue to provide the high level of innovation and quality customer service that has resulted in national recognition among state agencies. DOR's stated goals for conducting this feasibility study toward the implementation of additional, modern contact center technology and operations are aligned with Gartner's recommended practice—to *drive transformation with a disciplined focus on the envisioned client and business outcomes to be tangibly realized*.

Gartner Consulting leverages the power of Gartner's actionable and objective insight, combining it with custom analysis and on-the-ground support, to help client organizations such as DOR make faster, smarter decisions and achieve stronger performance on the organization's mission-critical priorities.

- **The Proposed Team is Well-Versed in Revenue Functions** — Gartner's proposed team has directly relevant experience working with other state revenue agencies. They understand the criticality of the contact center function for a public facing department that must support the financial needs of the State through operations that are sometimes uncomfortable for state residents and entities. As tax laws and activities continue to increase in complexity, WA DOR's ability to successfully provide and maintain high levels of customer service quality will have a direct relation to the corresponding level of effort necessary to encourage or enforce compliance. Gartner's team has a track record of working with revenue agency clients to identify the best combination of technology capabilities and corresponding operational need and adjustments to maintain and improve customer satisfaction, and operations.
- **Critical Tax System Expertise** — Gartner has a dedicated team that focuses specifically on helping Revenue clients strategically support business operations through integrating the right technology solutions with strategic IT Operations (while mitigating any risks that may arise). This team of unrivaled experts bridge the gap between Gartner's world-class business/technology research and work with agencies to bring relevant IT and operations trends from both the public



and private sector into customized strategies and plans that are actionable and consumable for Gartner’s clients. The team has worked with clients in similar situations as WA DOR, both nationally and internationally. Our clients have included the New York City Department of Finance, the District of Columbia Office of the Chief Financial Officer, the Finnish Tax Administration, the South Africa Revenue Service, the County of San Mateo, the Connecticut Department of Revenue, the Florida Department of Revenue, the City and County of San Francisco, and the County of Santa Clara. Gartner’s work spans the full life cycle of Revenue Agency operations and modernization initiatives. Chris Ragan and Paul Petersen, the Revenue Subject Matter Experts (SMEs) in this proposal are leaders in Gartner’s Assessment, Tax & Revenue Center of Excellence.

- **Washington Knowledge and Experience** — Gartner Consulting has been serving the state of Washington for more than 17 years. Gartner has amassed a comprehensive resume of work with state and local government entities in the Pacific Northwest including previous work with the DOR and your peer agencies, such as the Washington Department of Social and Health Services, WaTech, and The Department of Labor and Industries. Gartner is familiar with OCIO policy and currently engaged in multiple feasibility studies within Washington. In addition, our research and advisory partners are actively engaged in more than 15 Washington State Agencies, and we are participants in the Washington IT community. These experiences provide the Gartner team with a deep understanding of the OCIO requirements that DOR must meet with this feasibility study, as well as the expectations from your authorizing environment.
- **Gartner is and has always been Independent and Objective** — One of the biggest challenges in today’s landscape is ensuring objectivity and independence from consultants and vendors. Gartner is the largest technology research organization in the world and is renowned for being technology and vendor independent and objective. We do not provide implementation services, sell software or hardware, or have alliances with those that do. It is our central value proposition to have no “downstream” commitments or bias toward or against any solution, vendor, or technology choice so we have no vested interest in a specific solution for the DOR.

We have organized our response according to the submittal requirements of Solicitation Number: K2073.

Table 1. Compliance Matrix

Proposal Content Table		
Proposal Section No.	Section Title	Work Request Section
1	Signed Executive Summary	Subsection 5.1
2	Written Proposal for completing the scope of work	Subsection 5.2
3	Deliverable Examples	Subsection 5.3
4	Consultant Qualifications — Resumes <i>For each consultant submitted for the project.</i>	Subsection 5.4



Proposal Content Table		
5	Schedule A — Vendor Information Response Form, Including Certifications and Assurances	Subsection 5.5
6	Schedule B — Deliverable Cost and Timeline	Subsection 5.6
7	Schedule C — Contract Issues List	Subsection 5.7
8	Schedule D — Consultant References	Subsection 5.8
9	Schedule E — Vendor Certification EO 18-03 Workers' Rights	Subsection 5.9
10	Schedule F — Vendor Certification Wage Theft Prevention	Subsection 5.10
11	Schedule G — Confidential Information List	Subsection 5.11

Our offer is valid for 90 days from the submission date of this Proposal. If this Proposal represents your requirements, please arrange for a duly authorized signatory to sign the Authorization page and return the entire Proposal to me via email at heide.cassidy@gartner.com.

Please contact me at +1 206 245 8321 or via email at heide.cassidy@gartner.com if you have any questions. We thank you for this opportunity and look forward to assisting DOR with this key initiative.

Sincerely,

Heide Cassidy
Senior Managing Partner, Gartner Consulting

cc: Kristina Mattull, Account Executive, Gartner

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1.0 Signed Executive Summary (5.1)

Introductory remarks

Gartner has been engaged and serving the Washington State government community for more than 17 years, and we are pleased to submit this proposal to the Washington State Department of Revenue (DOR) to continue our support for the State's critical initiatives. The global pandemic of the past few years has been felt strongest at home, and Washington's public facing agencies and services have been tested more intensely than expected. DOR's reflection on customer service needs that lead to this solicitation, shows the Department's strong commitment to maintaining high levels of service to both the citizens and government institutions that rely on them as a foundation of safeguarding and caring for the Washington community.

Gartner also prides itself on serving customers with the right actionable insights to support our clients with the knowledge, plans, and support necessary to address our clients' mission-critical needs—like the increasing complexity, length, and volume of Revenue agency service demands. We would consider it a privilege to continue our research and consulting relationship with DOR through supporting this Feasibility Study engagement. Gartner has a dedicated team that focuses specifically on helping Revenue clients strategically support business operations through integrating the right technology solutions with strategic IT Operations. In addition, our technology experts in contact centers and technology architecture bridge the gap between Gartner's world-class business/technology research and work with agencies to bring relevant IT and operations trends (from both the public and private sector) into synthesized strategies and plans that are actionable and consumable. We enjoy doing this type of work to support our clients' success.

Brief summary of Vendor's and Consultant's experience and history providing feasibility study services similar to this Scope of Work, including number of years of such work

Gartner Consulting has been providing feasibility study services to our federal, state, and local government clients for more than 30 years, covering the intersection of technology and business operations across the full spectrum of the civic service mission. We have specifically been serving the state of Washington for more than 17 years. Gartner has amassed a comprehensive resume of work with the State, including previous Feasibility Study work with DOR regarding technology and sales suppression. We continue to work with DOR's peer agencies, such as the Washington Department of Social and Health Services, WaTech, and the Department of Labor and Industries. Gartner is familiar with OCIO policy and currently engaged in multiple feasibility studies within Washington (e.g., current projects at DCYF, OSPI and L&I). These experiences and partnerships provide the Gartner team with a deep understanding of the OCIO requirements that DOR must meet with this feasibility study, as well as the expectations from your authorizing environment.

Date Vendor and Consultant(s) are available to start work

December 1, 2022

Name, title, and signature of person with authority to enter into a Contract on behalf of the Vendor

The following individual is authorized to contractually bind Gartner and negotiate terms and conditions which govern the Agreement.

 Kristin Ghanem

Digitally signed by Kristin Ghanem
Date: 2022.10.06 14:22:13 -04'00'



Kristin Ghanem, Associate Director — Contracts

Heide Cassidy, Senior Managing Partner

2.0 Written Proposal for Completing Scope of Work (5.2)

2.1 Approach and Methodology

Gartner’s methodology is founded on Gartner research, refined through our experience performing similar projects, and tailored to WA DOR’s specific needs. Our approach follows five primary steps, as shown in the figure below and described in detail in Table 2.

Figure 1. Gartner Approach

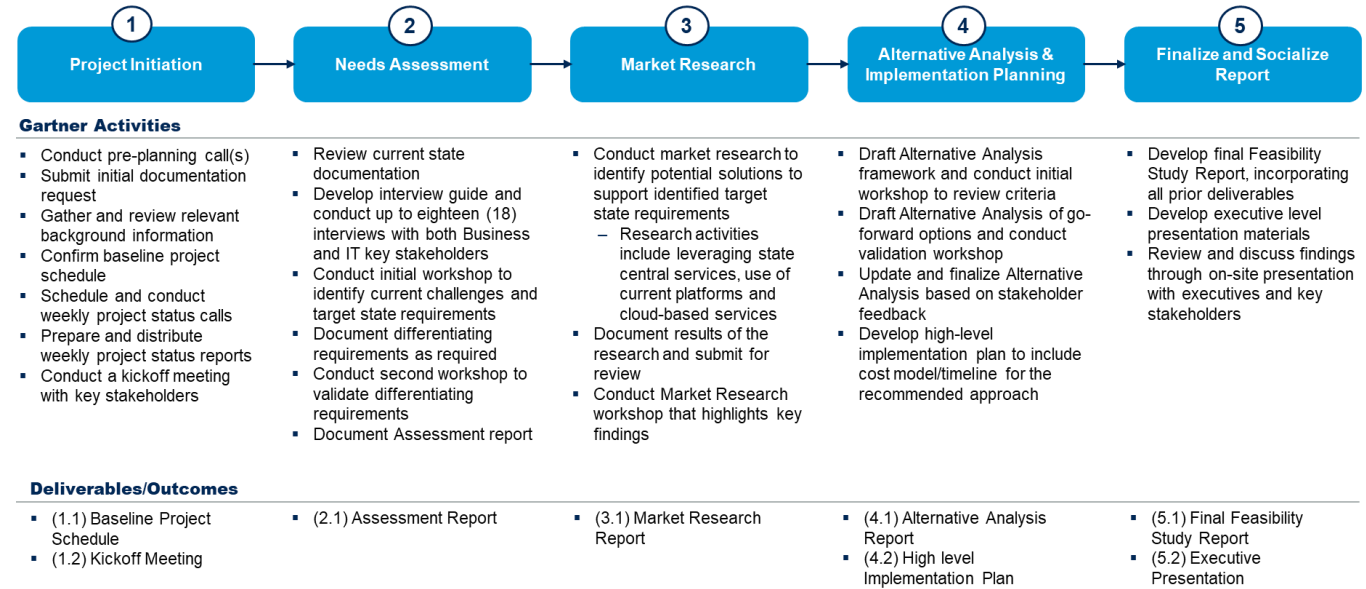


Table 2. Gartner Task Descriptions

Feasibility Study of Next Gen Contact Center Platform	
Project Initiation	
Objective	<ul style="list-style-type: none"> Work closely with DOR to set foundation for a successful engagement that is delivered on time, within budget and meets DOR’s objectives
Activities Performed by Gartner	<ul style="list-style-type: none"> Conduct pre-planning call/s Submit initial documentation request Gather and review relevant background information Confirm baseline project schedule Schedule and conduct weekly project status calls Prepare and distribute weekly project status reports Conduct a kickoff meeting with key stakeholders
DOR’s Responsibilities	<ul style="list-style-type: none"> Identify key internal and external project stakeholders Provide any relevant background materials Participate in project meetings as required
Outcomes/Deliverables	<ul style="list-style-type: none"> (1.1) Baseline Project Schedule (1.2) Kickoff Meeting

Time Frame ■ Weeks 1-2

Needs Assessment

Objective ■ Review, refine, validate and document target state requirements for a Next Generation Contact Center Platform

Activities Performed by Gartner

- Review current state documentation
- Develop interview guide and conduct up to eighteen (18) interviews with both Business and IT key stakeholders
- Conduct initial workshop to identify current challenges and target state requirements
- Document differentiating requirements as required
- Conduct second workshop to validate differentiating requirements
- Document Assessment report

DOR's Responsibilities

- Respond to any Gartner questions in a timely manner
- Identify, schedule, and participate in interviews and workshops as required
- Review and provide feedback on Gartner deliverables

Outcomes/Deliverables ■ (2.1) Assessment Report

Time Frame ■ Weeks 3-7

Market Research

Objective ■ Conduct market research into potential solutions

Activities Performed by Gartner

- Conduct market research to identify potential solutions to support identified target state requirements
 - Research activities include leveraging state central services, use of current platforms and cloud-based services
- Document results of the research and submit for review
- Conduct Market Research workshop that highlights key findings

DOR's Responsibilities

- Respond to any Gartner questions in a timely manner
- Schedule and participate in workshops as required
- Review and provide feedback on Gartner deliverables

Outcomes/Deliverables ■ (3.1) Market Research Report

Time Frame ■ Weeks 7-9

Alternatives Analysis & Implementation Planning

Objective ■ Develop a detailed Alternative Analysis framework of potential solutions, including a recommended approach

Activities Performed by Gartner

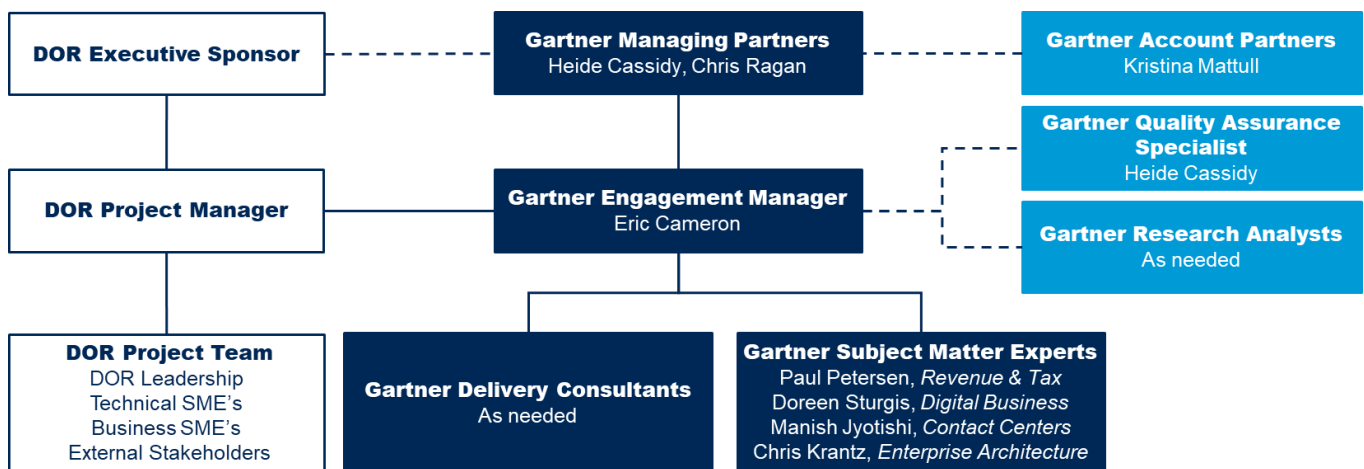
- Draft Alternative Analysis framework and conduct initial workshop to review criteria
- Draft Alternative Analysis of go-forward options and conduct validation workshop
- Update and finalize Alternative Analysis based on stakeholder feedback
- Develop high-level implementation plan to include cost model/timeline for the recommended approach

DOR's Responsibilities	<ul style="list-style-type: none"> Respond to any Gartner questions in a timely manner Schedule and participate in workshops as required Review and provide feedback on Gartner deliverables
Outcomes/Deliverables	<ul style="list-style-type: none"> (4.1) Alternative Analysis Report (4.2) High level Implementation Plan
Time Frame	<ul style="list-style-type: none"> Weeks 10-14
Finalize and Socialize Report	
Objective	<ul style="list-style-type: none"> Document and present all findings and final recommendations into a comprehensive final report, including an executive summary
Activities Performed by Gartner	<ul style="list-style-type: none"> Develop final Feasibility Study Report, incorporating all prior deliverables Develop executive level presentation materials Review and discuss findings through on-site presentation with executives and key stakeholders
DOR's Responsibilities	<ul style="list-style-type: none"> Respond to any Gartner questions in a timely manner Schedule and participate in briefing as required Review and provide feedback on Gartner deliverables
Outcomes/Deliverables	<ul style="list-style-type: none"> (5.1) Final Feasibility Study Report (5.2) Executive Presentation
Time Frame	<ul style="list-style-type: none"> Weeks 14-15

2.2 Proposed Consultants

Gartner has created an organization structure for this engagement that provides high-level sponsorship and quality assurance, strong day-to-day project management, a focused team of project consultants, and deep subject matter expertise. The key roles and proposed individuals for the Gartner team are shown in Figure 2.

Figure 2. Gartner Project Team for DOR



2.2.1 Roles and Responsibilities

Table 3 describes the roles and responsibilities for this engagement.

Table 3. Project Team Roles and Responsibilities

Role	Responsibilities
Managing Partners Heide Cassidy Chris Ragan	<ul style="list-style-type: none"> Oversee alignment of Gartner activities to support DOR goals. Build and maintain a long-standing relationship with DOR. Provide high-level oversight to the project and become more heavily involved should any issue resolution be necessary.
Engagement Manager Eric Cameron	<ul style="list-style-type: none"> Day-to-day management of project initiatives to achieve on-time completion of deliverables that meet quality standards. Act as the primary point of contact for the Gartner team. Work closely with DOR to confirm that Gartner is meeting its needs.
Project Consultant(s) To be determined	<ul style="list-style-type: none"> Provide day-to-day consulting support for project steps. Provide support for data collection, data analysis and recommendations for activities. Participate in deliverable creation, deliverable review and client presentations as needed. Present results to DOR as needed.
Project Consultant(s) Paul Petersen Doreen Sturgis Manish Jyotishi Chris Krantz	<ul style="list-style-type: none"> Provide industry-leading insights, best practices, lessons learned and current trends to enhance the value of Gartner’s recommendations to DOR. Contribute expertise as needed throughout the project.
Quality Assurance Specialist Heide Cassidy	<ul style="list-style-type: none"> Provide quality assurance review of Gartner project plan and Gartner deliverables throughout the engagement. Promote value through use of the Gartner Project Management Life Cycle.
Research Analyst	<ul style="list-style-type: none"> Support the core project team by providing a context-sensitive perspective to issues specific to DOR based on Gartner industry-leading research. Participate in analysis and comparisons, and review deliverables as needed.
Gartner Account Partners Kristina Mattull	<ul style="list-style-type: none"> Oversee that value delivered is seamlessly integrated with all Gartner services to DOR and that recommendations are actionable through ongoing Gartner services. Provide additional guidance and context so this engagement is aligned to, and advances, the mission-critical priorities of DOR.

2.3 Issues and Risk Management

Gartner’s approach to risk management is both proactive and collaborative. During project planning, we will work with the DOR to mutually develop a Risk Management Plan that includes:

- Roles and responsibilities for identifying, managing and mitigating/addressing project risk
- Timetable/schedule and an approach for identifying, managing and documenting risk status
- Guidance and tools for quantitative and qualitative risk analysis to determine probability and severity of identified risk
- Templates/tools for logging and documenting the status of risk (e.g., risk register)

- Process for monitoring risks
- The initial list of identified project risks captured in the risk register

The Gartner team will communicate regularly with relevant stakeholders for project purposes, and the Gartner Project Manager will be in close contact on a regular basis with the assigned the DOR Project Manager (a designated single point of contact). Both the Gartner Project Manager and Gartner Quality Assurance lead will be readily available for briefings and to address any open questions or issues.

Gartner’s comprehensive project management methodology includes consistent, ongoing communication with the DOR, including informal discussions and knowledge transfer, as well as formal, weekly status reporting. Gartner will conduct weekly status review meetings to ensure that the DOR is kept apprised of the project progress. These meetings involve review of the previously issued status report, taking stock of progress-to-date, issues and issue resolution, and discussions on upcoming activities and milestones.

2.4 Project Responsibility and Authority

Gartner has assigned a dedicated Engagement Manager, Eric Cameron, and Managing Partners, Heide Cassidy and Chris Ragan, to oversee and manage project activities and the Gartner team working closely with DOR’s Project Manager.

Gartner Engagement Manager	Gartner Managing Partner	DOR’s Project Manager
Responsible for managing the project’s progress and momentum, ensuring that Gartner activities support the client’s goals, building and maintaining a long-standing relationship with the client, providing high-level oversight of the project, and taking action as needed to resolve issues.	Responsible for ensuring client satisfaction, providing project oversight, and delivering an additional layer of quality assurance.	Together with the Gartner Engagement Manager, responsible for driving the efforts and participating in regular progress review and risk management. They will agree upon a format and schedule acceptable to DOR in order to report progress on the metrics agreed.

Gartner’s Senior Managing Partner, Heide Cassidy will have prime responsibility and authority for the work performed.

2.5 Alternative Approach

Not applicable. Gartner’s approach is tailored to align with the DOR’s scope of services and desired deliverables, while incorporating best practices, lessons learned and industry-leading insights.

RCW 42.56.270(11)

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CONFIDENTIAL INFORMATION

RCW 42.56.270(11)

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4.0 Consultants Qualifications — Resumes (5.4)

Gartner has assigned experienced, knowledgeable consultants to lead the delivery of our services, including Eric Cameron as the Engagement Manager, Chris Ragan as a Managing Partner and revenue subject matter expert, and Heide Cassidy as the Accountable Executive and Quality Assurance Specialist. These key team members will be supported by subject matter experts and delivery consultants that focus on key elements of the services provided and your operating environment.

With more than 760 consultants worldwide, Gartner has a deep bench of resources and experience to call upon to meet agreed timelines and achieve DOR's goals.

Dedicated Public Sector Practice

Gartner's dedicated public sector practice has served government clients for 40 years. Our organization focuses specifically on the government and public sectors, including national, federal, state, regional and local government agencies and organizations (cities, counties, municipalities, etc.) around the world. While drivers and constraints for IT investment and adoption depend on regional and programmatic imperatives, government and public-sector organizations share IT decision-making processes and priorities that clearly differentiate them from the private sector. Our experiences in this sector encompass multiple government programs, including revenue and taxation, public safety and justice, health and human services, transportation, pensions and retirement, environmental, and defense.

Gartner has guided billions of dollars in expenditures while helping government leaders around the world solve their most complex business issues. ***Our public sector practice serves over 1,000 governments and public sector agencies globally.***

Gartner employs more than 50 people in the ***Pacific Northwest*** (including our proposed Engagement Manager, Eric Cameron, and Accountable Executive and Senior Managing Partner, Heide Cassidy). We have a long history of working with State of Washington agencies. Gartner is currently supporting more than 15 agencies in a research and advisory capacity and ***our consulting team has been active in the State of Washington for over 17 years.*** A representative sample of recent and active engagements supported by the Gartner Pacific Northwest team include:

- Washington Technology Solutions (WaTech) — Zero Based Budget Review
- Department of Revenue — Sales Suppression Feasibility Study
- Office of the Superintendent of Public Instruction (OSPI) — SAFS Modernization Feasibility Study
- Department of Children, Youth, and Families — Child Welfare Case Management system planning and feasibility study (in flight)
- Department of Labor & Industries — Workers Compensation System Modernization replanning and feasibility study (in flight)
- Department of Social and Health Services — Integrated Eligibility and Enrollment QA Services (in flight)

Gartner's collective experience and knowledge of the State of Washington's operating environment, work culture, strategy and goals, OCIO policies, and stage-gate process will be brought to bear for DOR on this effort. We will collaborate and partner with DOR to deliver a focused engagement to support Contact Center Modernization and the ensuing community benefits and outcomes.

Strong Communication

The Gartner team is accustomed to working with various technical and non-technical client personnel, from staff to executives. Our consultants are often complimented on their strong communication, positive attitudes, flexibility, and level of collaboration while achieving agreed upon timelines.

Each proposed key person for this project, as well as any additional resources we may bring, has significant experience communicating with commercial and public sector clients with excellent written, oral and interpersonal communication skills.



Excellent collaboration, good dialogue, and ease of communication resulted in good results for our project.

— Public Sector Client, North America



Independent and Objective

Gartner consultants deliver independent, objective, accurate and rigorously researched insights. For 43 years, Gartner has been the leading source of independent insight and advice regarding information technology. The authority the Gartner name carries combined with the credibility of our work, is a direct consequence of our absolute objectivity. Gartner possesses no relationships or biases toward any vendor, service provider or third-party organization. We can expressly state that Gartner performs no downstream technology implementation or services work.

We are solely focused on the objectives of this engagement and the current and long-term goals of DOR. The following principles of Gartner are enacted by our proposed consultants — and all Gartner consultants — every day on every project.



Recommendations without Influence

- Gartner recommendations are produced without the influence or approval of outside investors, shareholders, organizations or directors.
- Gartner possesses no relationships or biases toward any vendor, service provider or third-party organization.
- Gartner performs no downstream technology implementation or services work. This means there are no factors that would influence the recommendations we make to your organization.



Independent Advice from Strategy to Execution

- Our consulting solutions provide specific, practical and impartial advice to clients at all points of their practice journey — from strategy to execution.
- On any consulting project, our recommendations are documented in detail within the project deliverables so it is clear how we arrived at our conclusions and that each recommendation has been made to both answer the specific questions asked of us and to enable maximum benefit to the client.



Avoidance of Conflicts of Interest

- We leverage a consistent and proven risk management process on a global basis to ensure we avoid conflicts of interest on our engagements.
- Gartner has a strict, companywide Conflict of Interest policy that ensures our associates are aware of their responsibilities and the various rules related to their professional conduct.
- Gartner is the only research organization of its kind equipped with an ombudsman's office designed to protect independence, objectivity and accuracy.

4.1 Proposed Key Personnel

Following are the project team members who are proposed to work on this engagement. If any of the individuals proposed herein are not available, Gartner will substitute another qualified professional with similar expertise and credentials.

Eric Cameron

Senior Director

State and Local Government, Gartner Consulting

Project Role: Engagement Manager



Eric Cameron has more than 20 years of IT strategy and technology consulting experience. He drives initiatives in the areas of application, procurement & staffing feasibility assessments, application strategy and rationalization, strategic planning and governance, cost optimization, enterprise transformation and quality assurance oversight.

Mr. Cameron has an M.B.A. from the Krannert School of Management at Purdue University, and a B.A. in Community, Environment and Planning from University of Washington.

Highly Desirable Knowledge, Experience and Qualifications	Yrs.
Demonstrated experience conducting system replacement feasibility studies or similar work in IT environments comparable to what is described in this Scope of Work.	10
Demonstrated experience working with WA state agencies on OCIO IT initiatives, preferably feasibility study.	5
Experience scoping systems integration projects.	10
Demonstrated experience articulating the major objectives of an IT investment and define the work necessary to achieve those objectives with a high degree of confidence.	15
Ability to provide detailed and concise contextual documentation and artifact generation (documents, charts, graphs, plans, etc.).	15
Experience assessing, evaluating, and/or architecting mission critical, high impact, highly visible systems.	15
Experience writing large, complex studies for state programs.	5
Experience evaluating risk and internal controls.	10
Strong analytical capabilities.	20
Excellent written, oral, and interpersonal communication skills.	20
Ability to fairly and impartially evaluate potential solutions that may be available from a variety of vendors.	20
Experience working under tight deadlines.	20
Ability to prioritize and manage multiple priorities.	20
Experience with and ability to facilitate diverse teams of business and IT professionals.	20
Additional Desired Consultant Experience	
Knowledge of telephony and Contact Center industry technologies.	8
Experience working with other Washington State agencies.	8
Experience working with other governmental organizations.	12

Recent project experience includes:

- *For the State of Washington (Leg-Tech)* — Staffing Feasibility Assessment to recommend appropriate staffing levels and improve organizational efficiencies in the delivery and support of customer initiatives
- *For the State of Washington Department of Revenue (DOR)* — Engagement Manager for development of a Sales Suppression Feasibility study
- *For the State of Washington Department of Labor and Industries (L&I)* — Independent third-party assessment of L&I's Workers' Compensation System Management (WCSM) replacement program

- *For the State of Washington (WaTech)* — Creation of a zero-based budget review in alignment of IT services for the state Shared Services provider, including modernization of existing applications and services
- *For the State of California (SWRCB)* — Lead development of a Risk/Readiness Assessment for the Updating Water Rights Data for California (UPWARD) project
- *For the State of Oregon (Enterprise Information Services)* — Development of M365 Implementation Roadmap
- *For the State of Oregon Department of Administrative Services (DAS)* — Engagement Manager for QA oversight of the DAS Workday payroll and time tracking implementation
- *For the Seattle Municipal Courts (SMC)* — Engagement Manager for QA assessment of \$40 million Municipal Court Information System
- *For the State of Oregon Employment Department (OED)* — Engagement Manager for the development of a legislatively mandated QA Risk Assessment for implementation of a Paid Family Medical Leave modernization program
- *For the State of Oregon Enterprise Technology Services (ETS)* — Engagement Manager for development of a Shared Services Assessment
- *For the State of Hawaii Public Utilities Commission (PUC)* — Subject matter expert in developing a comprehensive assessment for modernization of an existing case management application
- *For the State of Oregon Data Center Services (DCS)* — Engagement Manager for the development of a Mainframe Benchmark Study
- *For the State of Oregon Higher Education Coordinating Commission (HECC)* — Engagement Manager for the development of a comprehensive assessment of a legacy Financial Aid Management System

Chris Ragan

Senior Managing Partner

State and Local Government, Gartner Consulting

Project Role: Managing Partner



Christopher Ragan specializes in strategic management and business/organizational analysis. Mr. Ragan has significant experience with employee development, business process re-engineering, and systematic group learning practices. Mr. Ragan has a M.B.A. from the University of California, Davis, and a B.A. in Cognitive and Developmental Psychology from Biola University.

Highly Desirable Knowledge, Experience and Qualifications	Yrs.
Demonstrated experience conducting system replacement feasibility studies or similar work in IT environments comparable to what is described in this Scope of Work.	15
Demonstrated experience working with WA state agencies on OCIO IT initiatives, preferably feasibility study.	3
Experience scoping systems integration projects.	15
Demonstrated experience articulating the major objectives of an IT investment and define the work necessary to achieve those objectives with a high degree of confidence.	15
Ability to provide detailed and concise contextual documentation and artifact generation (documents, charts, graphs, plans, etc.).	15
Experience assessing, evaluating, and/or architecting mission critical, high impact, highly visible systems.	15
Experience writing large, complex studies for state programs.	15
Experience evaluating risk and internal controls.	15
Strong analytical capabilities.	15
Excellent written, oral, and interpersonal communication skills.	15
Ability to fairly and impartially evaluate potential solutions that may be available from a variety of vendors.	15
Experience working under tight deadlines.	15
Ability to prioritize and manage multiple priorities.	15
Experience with and ability to facilitate diverse teams of business and IT professionals.	15
Additional Desired Consultant Experience	
Knowledge of telephony and Contact Center industry technologies.	10
Experience working with other Washington State agencies.	3
Experience working with other governmental organizations.	15

Recent project experience includes:

- *For the State of Washington Department of Revenue (DOR)* — Managing Partner and Revenue Subject Matter Expert (SME) for development of a Sales Suppression Feasibility study
- *For Florida’s Agency for Health Care Administration’s (AHCA)* — Feasibility Study and Alternatives Analysis for the Integrated Eligibility solution. Analyzed current state of IT-business operations, capabilities and partnerships. Developed key strategic business imperatives and 6 IT solution Alternatives. Alternatives Analysis and Recommendations spanned Business and Strategic Alignment, Architecture and Technical Requirements, Project Management/Governance implications, and a 15 year Total Cost of Ownership (TCO).
- *For San Mateo County’s Office of the Assessor, Auditor-Controller, and Treasurer-Tax Collector* — Procurement Strategy, Use Case, and Functional Requirement Development. Project managed and facilitated cross-functional subject area workshops across 3 elected officials’ organizations and the County Technology Department to develop content spanning the property tax life cycle. Lead the analysis of current local Business functions and the Future Visioning and Transformation of Department activities to be supported by readily-available modern technologies. Developed Business Operations Process Flows, Use Cases, and

Functional Requirements across all subject areas. Ongoing work includes the development of targeted system architectures, deployment strategy, and procurement assistance.

- *For Sacramento County's Department of Finance, Auditor-Controller, and Treasurer-Tax Collector* — Use Case, and Functional Requirement Development. Project Managed and Facilitated cross-functional subject area workshops across the Department of Finance's Auditor-Controller and Tax Collector departments, as well as the County Technology Department to develop content spanning the receipt of Assessed values from the County Assessor to the extension of the tax roll, the billing and collection of taxes, and the apportionment and distribution of tax revenue. Lead the analysis of current local Business functions and the Future Visioning and Transformation of Department activities to be supported by readily-available modern technologies. Developed Business Operations Process Flows, Use Cases, and Functional Requirements across all subject areas. Ongoing work includes the development of targeted system architectures, deployment strategy.
- *For the Santa Clara County Assessor's Office* — Advised on County Assessor's Solution Modernization project for a legacy mainframe system modernization assessment. Evaluated various options for migrating, updating, and/or reducing risks related to the existing mainframe system. This including re-platforming, developing a new custom solution, evaluating the vendor market, and assessing a potential transfer solution from another county and vendor.
- *For the New York City Department of Finance (NYC DOF)* — Assessment, Modernization Strategy, Alternatives Analysis, and Procurement Assistance. Assessment of the NYC DOF Tax Operational/Technical environment, System Modernization Strategy, Market Scan, and Go-forward Roadmap. Continued as SME for additional assistance throughout new Solution Procurement Activities.
- *For the County of San Diego's Integrated Property Tax System* — Conducted 25 cross-functional subject area workshops for members of the County Assessor's Office, the Office of the Auditor & Controller, and the County Treasurer-Tax Collector. Analyzed, synthesized, and developed content spanning the property tax life cycle, from property acquisition to the apportionment & distribution of tax revenue to applicable agencies. Developed functional requirements across all subject areas, developed a system architecture and deployment strategy, and conducted an executive cost-benefit analysis.
- *For the National Association of State Workforce Agencies* — Project Managed Use Case and Functional Requirement Development for the UI/Workforce Connectivity project. Analyzed current business processes and technical environments across three partner states, common system functionalities and technology alternatives were identified and a strategic recommendation were compiled through research, interviews and workshops. Detailed use cases and requirements were developed in alignment with business-IT objectives.
- *For the State of Hawaii's Department of Human Services* — IT Assessment and New System Roadmap. Analyzed the Department's Operations/Technology environment with an eye for identifying business improvement opportunities and needs. Worked closely with all aspects of the Social Services Division to identify business needs across Child Protective Services and Adult Protective Services across the State. Developed an Implementation Roadmap for the introduction of new business processes, technology, and other key initiatives to improve the overall efficiency of the divisions to deliver quality services to citizens. Developed Use Cases and Functional Requirements for a new technology solution to be procured.
- *For the California Correctional Health Care Services* — Development, Testing, and Training Subject Matter Expert for the deployment CCHCS' Health Care Scheduling Module, part of the CDCR Strategic Offender Management System (SOMS). Advised and worked with a team of 15 to 20 contractors and State employees to design, build, and test a modified-off-the-shelf logistical scheduling system. Conducted extensive workshops with all levels of CCHCS and CDCR employees to assess, develop, and implement change management and training processes and solutions to meet the organization's system deployment needs.
- *For the California Prison Health Care Service* — RFP development for CPHCS' Health Care Scheduling System (HCSS). Developed detailed business flow models for all Medical, Dental, and Mental Health care processes. Applied Use Case Methodology to develop functional requirements through detailed interviews and workshops. Conducted detailed market research at the city, state, and international levels.
- *For the Los Angeles Department of Health Services* — Electronic Health Record (EHR) Strategic Readiness Assessment. Core member of Assessment Development and Analysis Team: utilized current, in-depth research from cutting edge analysts; hands-on observations and evaluations of current state systems, infrastructure, and facilities; and 30+ stakeholder interviews across the enterprise to assess the Department's readiness to implement an integrated, multi-disciplinary, systemwide EHR. Developed complex challenging scenarios and demonstration scripts to differentiate and highlight the benefits of distinct vendor solutions.

Heide Cassidy

Senior Managing Partner

State and Local Government, Gartner Consulting

Project Role: Quality Assurance Specialist



Heide Cassidy is the Public Sector Consulting Lead for the Pacific Northwest region. Ms. Cassidy has over 25 years of experience leading transformational change for Public Sector organizations. She is well-versed in all aspects of strategy formulation, systems implementation, and business transformation. Ms. Cassidy’s background is in IT strategic planning, IT governance, program quality assurance, application modernization, and enterprise transformation.

Ms. Cassidy has a B.A. in Political Science and Economics, and a B.B.A. from Pacific Lutheran University. She is Project Management Professional (PMP) certified.

Highly Desirable Knowledge, Experience and Qualifications	Yrs.
Demonstrated experience conducting system replacement feasibility studies or similar work in IT environments comparable to what is described in this Scope of Work.	20
Demonstrated experience working with WA state agencies on OCIO IT initiatives, preferably feasibility study.	17
Experience scoping systems integration projects.	20
Demonstrated experience articulating the major objectives of an IT investment and define the work necessary to achieve those objectives with a high degree of confidence.	20
Ability to provide detailed and concise contextual documentation and artifact generation (documents, charts, graphs, plans, etc.).	25
Experience assessing, evaluating, and/or architecting mission critical, high impact, highly visible systems.	25
Experience writing large, complex studies for state programs.	20
Experience evaluating risk and internal controls.	15
Strong analytical capabilities.	25
Excellent written, oral, and interpersonal communication skills.	25
Ability to fairly and impartially evaluate potential solutions that may be available from a variety of vendors.	20
Experience working under tight deadlines.	25
Ability to prioritize and manage multiple priorities.	25
Experience with and ability to facilitate diverse teams of business and IT professionals.	25
Additional Desired Consultant Experience	
Knowledge of telephony and Contact Center industry technologies.	10
Experience working with other Washington State agencies.	17
Experience working with other governmental organizations.	25

Recent project experience includes:

- *For a State of Washington Agency* - Client executive for 3 critical projects to reset Washington Labor and Industries Workers Compensation System Modernization efforts including current engagement which will culminate in feasibility study.
- *For an Oregon State Agency* – Client executive for Oregon DOR Data and Analytics engagement. This included an assessment of the current state and a roadmap for transformation of the organization to better utilize data in the revenue agency.
- *For a State of Washington Agency* - Client executive for WA DSHS Integrated Eligibility and Enrollment Quality Assurance. This included periodic reports to evaluate progress and risks of the project and the HHS coalition

- *For a State of Washington Agency* – Client executive for feasibility study to evaluate technology options to avoid sales suppression.
- *For a State of Washington Agency* - Client executive for WA DCYF Child Welfare Case Management System Planning and Feasibility Study. Work is currently underway to help the state plan for replacement of its existing case management system with a new modular system. Gartner's work will culminate in a roadmap and feasibility study.
- *For a State of Washington Agency* - Client executive for WA OSPI Apportionment Feasibility Study
- *For a State of Washington agency* — Feasibility study on an enterprise system and assessment of an existing legacy system utilized by 400 state agencies, higher education institutions and political subdivisions; developed future state use cases, analyzed technology options and made recommendations on the replacement strategy
- *For a State of Washington Agency* - Client executive for WA Leg Tech CMS Alternatives Analysis
- *For a State of Washington agency* — Independent Verification and Validation (IV&V) project on a critical regulatory application.
- *For a State of Oregon Agency* - Client executive for Oregon Workday Payroll Quality Management Services
- *For the State of Washington* — Led a \$17.3M technology grant program consisting of 7 diverse projects. Established strategy, governance and project life cycle management, including management tools and practices.
- *For a State of Oregon Agency* - Client executive for Oregon Network Strategy
- *For a State of Oregon Agency* - Client executive for Oregon Secretary of State Quality Management Services
- *For the State of Washington* — Strategic advisor to the One Washington Program, a strategic effort to transform business processes and replace the state's core financial systems; specific services provided include program management and project leadership, procurement support, technology leadership, business change support, strategic advice and subject matter expertise
- *For the State of Washington* — Advisor to the Washington Health Benefits Exchange. Responsible for coordinating execution of all startup activities including IT, operations, policy, marketing and systems support. As the client lead, managed a consulting team of seven consultants responsible for supporting the exchange. After "go-live," Ms. Cassidy worked with the Chief of Staff and CEO to fully transform the organization from a startup to a mature operational entity. Washington's exchange is regarded as one of the best exchanges in the Country
- *For the State of Washington* — Supported a large transformation program in insurance services to modernize business practices through internal improvement activities and implementation of legislative changes. The team facilitated change across organizational areas — Business, IT, and Communications — to achieve success. Met weekly with the Agency Director and other Executive Leaders to clarify vision and report progress. The program was successfully implemented on time with cost savings of over \$200 million annually
- *For a State of Oregon agency* — Acted as the client executive performing Quality Assurance (QA) over a Digital transformation program including migration to the Cloud. Oversaw team performing Cloud strategy and migration planning.
- *For a State of Oregon agency* — Performed QA on an enterprise implementation of Workday Human Resources across over 60 state agencies.
- *For a State of Oregon agency* — Acted as the client executive for a feasibility study on a core applications modernization study including alternatives to migrate to cloud-based solutions.

4.2 Proposed Subject Matter Experts

The following subject matter experts will provide insights, lessons learned, best practices and knowledge to bring exceptional value to our services.

Paul Petersen

Associate Partner

State and Local Government, Gartner Consulting

Project Role: Assessment, Tax & Revenue SME



Paul Petersen leads Gartner’s Assessment, Tax & Revenue (ATR) Industry Service Line. Although he has focused predominantly on Tax & Revenue Management throughout his professional life, Paul’s career has traversed the public and private sectors having served clients across federal, state, provincial and municipal government agencies, financial services institutions, consumer products, manufacturing, sales, service, and distribution organizations, and more.

As a tax and revenue management Subject Matter Expert, Mr. Petersen brings experience as a past developer and system integrator of tax and revenue systems having spent considerable time working with FAST Enterprises (GenTax) and Oracle. With 20+ years of large-scale tax and finance system implementation and consulting experience, Mr. Petersen has advised and contributed to several strategic planning initiatives and system transformations at the state, federal, provincial, and municipal levels. He provides deep insights and expertise of system integrator culture, implementation methodologies, system specific data models, structure and access.

Prior to joining Gartner, Mr. Petersen held the role of Senior Manager in Deloitte Canada’s Technology Consulting and Technology, Strategy & Architecture practices.

Highly Desirable Knowledge, Experience and Qualifications	Yrs.
Demonstrated experience conducting system replacement feasibility studies or similar work in IT environments comparable to what is described in this Scope of Work.	12
Demonstrated experience working with WA state agencies on OCIO IT initiatives, preferably feasibility study.	-
Experience scoping systems integration projects.	20
Demonstrated experience articulating the major objectives of an IT investment and define the work necessary to achieve those objectives with a high degree of confidence.	13
Ability to provide detailed and concise contextual documentation and artifact generation (documents, charts, graphs, plans, etc.).	20
Experience assessing, evaluating, and/or architecting mission critical, high impact, highly visible systems.	20
Experience writing large, complex studies for state programs.	12
Experience evaluating risk and internal controls.	17
Strong analytical capabilities.	20+
Excellent written, oral, and interpersonal communication skills.	20+
Ability to fairly and impartially evaluate potential solutions that may be available from a variety of vendors.	20+
Experience working under tight deadlines.	20+
Ability to prioritize and manage multiple priorities.	20+
Experience with and ability to facilitate diverse teams of business and IT professionals.	20+
Additional Desired Consultant Experience	
Knowledge of telephony and Contact Center industry technologies.	-
Experience working with other Washington State agencies.	-
Experience working with other governmental organizations.	20+

Recent project experience includes:

- *For over 10 State, Provincial and Local Tax and Revenue agencies* — Subject matter expert and advisor, managing the design, configuration, and implementation of key functional areas for COTS integrated tax and revenue management solutions (FAST's GenTax and Oracle's PSRM), as well as development of core solution functionality enhancements as identified throughout the implementations. Served as an advisor to both agency and System Integrator (SI) leadership, oversaw QA and IV&V activities and advised on best practices and approach for design, configuration and implementation of solutions, data conversion and migration, business process/rule re-engineering and improvements, testing, training, and production support.
- *For the State of Iowa, Department of Revenue (IDR)* — Engagement Manager and tax Subject Matter Expert for Gartner's Independent Verification & Validation engagement, providing value assurance and managing all associated deployment risks for IDR's GenTax implementation.
- *For the Commonwealth of Virginia, Department of Taxation* — Engagement Manager and overall tax Subject Matter Expert for Gartner's business benefits realization and assessment, and modernization business case engagement supporting VA Taxation's integrated tax system modernization program.
- *For the State of Nevada, Department of Taxation* — Quality Assurance Partner, as well as taxation Subject Matter Expert for Nevada Taxation's integrated tax system modernization initiative. Gartner is assisting Nevada Tax with the creation of an RFP, vendor evaluation and selection.
- *For the State of Oregon, Department of Revenue* — Quality Assurance Partner and oversight for Gartner's data and analytics strategy engagement with Oregon DOR and provides tax & revenue management subject matter expertise.
- *For the State of Michigan, Department of Treasury* — Senior Business Architect and subject matter expert for Michigan's Treasury Modernization Project.
- *For the State of Iowa, Department of Revenue (IDR)* — As a subject matter expert, provided advisory services for the Iowa Department of Revenue's planned integrated tax system modernization initiative inclusive of data management and data conversion strategy, business case validation, benefits identification and realization strategy, organization and system readiness activities, current and future state analysis and recommendations, as well as functional and technical requirements definition. Project culminated in co-authoring IDR's integrated tax system modernization RFP.
- *For the State of Oregon, Liquor Control Commission (OLCC)* — Engagement Manager and subject matter expert, providing project oversight (IV&V) services to OLCC for their Online Privilege Tax system modernization initiative.
- *For the State of Nevada, Department of Taxation (NV Tax)* — Engagement Manager, subject matter expert and executive advisor on Nevada Department of Taxation's planning and strategy initiatives in preparation for their tax system modernization project. The scope of work encompassed current and future state assessment and recommendations, business case and benefit realization strategies, organization and system readiness assessments and roadmap which established a plan of initiatives to help improve the maturity and readiness across multiple disciplines for NV Tax as a whole.

Past experience working with clients outside the U.S. includes:

- *For a European Federal Tax authority* — Provided periodic QA, review and analysis of solution implementation milestones, deliverables, and oversight on adherence to prescribed implementation methodology. Contributed to strategic advisory board driving enhanced compliance analytical models to improve voluntary compliance, revenue collections and strategic audit targeting.
- *For a Canadian Provincial Ministry of Finance Tax agency* — Managed the design, configuration and overall implementation project for a COTS integrated tax and revenue management solution supporting administration, revenue collections, audit management, analytics, and discovery functions for a major tax program responsible for over \$16 billion in annual provincial revenues.
- *For a Canadian Provincial Ministry of Finance Tax agency* — Managed the design, configuration, and implementation of key functional areas for a COTS integrated tax and revenue management solution, as well as development of core solution functionality enhancements as identified throughout the engagement. Continued on to manage post-go-live support as well as long term Application Maintenance and Support (AMS) services.
- *For a Canadian Provincial Ministry of Finance Revenue Division* — Advisory services for consolidated non-tax revenue collection enhancements.

Manish H. Jyotishi

Senior Director

IT Infrastructure & Operations, Gartner Consulting

Project Role: Contact Center SME



Manish Jyotishi has over 20 years of experience in the IT Industry with a proven track record of solving challenging business problems with innovative, scalable, and effective enterprise solutions. Mr. Jyotishi is a results-oriented technology leader with the ability to align IT infrastructure capabilities to business needs. His work experience includes the development and execution of global network infrastructure and enterprise mobility strategy, Program & Portfolio Management (PPM), IT process engineering, and Profit & Loss (P&L) based product and operation management.

Mr. Jyotishi has successfully delivered engagements within IT Infrastructure & Operations (I&O) and Security & Risk Management practices across various industries, including government agencies, healthcare providers, higher education, and the financial services industries. He joined Gartner in 2008.

Prior to joining Gartner, Mr. Jyotishi was a senior director at NYSE EuroNext, where he was responsible for leading system engineering, project management and operations management teams. During his tenure at NYSE EuroNext, he led numerous business transformation and operational initiatives including the roll-out of Financial Extranet, low-latency trading platform, data center consolidation, post-9/11 recovery of the trading platforms, and consultative services to financial institutions and exchanges on their infrastructure enhancements.

Mr. Jyotishi has a M.S. in Telecommunications Management from Stevens Institute of Technology (Hoboken, New Jersey) and an undergraduate degree in Telecommunications Engineering from the City University of New York (CUNY). He also holds an ITIL V3 foundation certification for ITSM.

Highly Desirable Knowledge, Experience and Qualifications	Yrs.
Demonstrated experience conducting system replacement feasibility studies or similar work in IT environments comparable to what is described in this Scope of Work.	25+
Demonstrated experience working with WA state agencies on OCIO IT initiatives, preferably feasibility study.	-
Experience scoping systems integration projects.	25+
Demonstrated experience articulating the major objectives of an IT investment and define the work necessary to achieve those objectives with a high degree of confidence.	25+
Ability to provide detailed and concise contextual documentation and artifact generation (documents, charts, graphs, plans, etc.).	25+
Experience assessing, evaluating, and/or architecting mission critical, high impact, highly visible systems.	25+
Experience writing large, complex studies for state programs.	-
Experience evaluating risk and internal controls.	15
Strong analytical capabilities.	25+
Excellent written, oral, and interpersonal communication skills.	25+
Ability to fairly and impartially evaluate potential solutions that may be available from a variety of vendors.	25+
Experience working under tight deadlines.	25+
Ability to prioritize and manage multiple priorities.	25+
Experience with and ability to facilitate diverse teams of business and IT professionals.	25+
Additional Desired Consultant Experience	
Knowledge of telephony and Contact Center industry technologies.	25+
Experience working with other Washington State agencies.	-
Experience working with other governmental organizations.	20+

Recent project experience in the public sector includes:

- *For the New York City Retirement Services (NYCERS)* — Developed contact center strategy and deployment roadmap covering multichannel contact center, CRM integration, and program to improve end-user reachability and satisfaction with NYCERS contact center.
- *For the District Attorney of New York* — Conducted telephone and network platform assessment and developed a strategic roadmap as part of the larger IT strategy.
- *For the State of Oregon* — Leading data center strategy project that improves infrastructure resiliency and a practical approach for cloud adoption.
- *For the State of Oregon* — Led network and security modernization strategy that improves service resiliency, supports a hybrid workforce and improves User Experience (UX) with the State’s applications. Established a five-year modernization roadmap and budget.
- *For the County of Santa Clara* — Led network strategy and modernization engagement supporting the development of the County’s requirements and use-cases for I&O platforms, assessment of current platforms, staffing levels, skills, and service delivery processes. Developed a strategic improvement roadmap and budget to modernize network services.
- *For the Defense Contract Audit Agency (DCAA)* — Developed network modernization strategy and deployment roadmap as part of a larger I&O strategy.
- *For the NYC Special Narcotics Prosecutors (SNP)* — As part of the broader IT strategy, conducted technology platform assessment and developed strategy and roadmap for systems supporting prosecutor cases, data sharing and collaboration, and storage systems.
- *For the NYC Department of Technology and Telecommunications* — Provided oversight and advisory support for deployment of IT strategy, the transition of Fire Department New York (FDNY) and New York City Police Department (NYPD) infrastructure to newly deployed ECTP infrastructure across five NYC boroughs, developed of performance metrics, and development of network and security architecture.

Additional relevant experience includes:

- *For a healthcare sector client* — Developed a Chief Financial Officer (CFO) ready business case for Unified Communications (UC) services to justify the investment of \$80 million (USD) to modernize telehealth and patient care services.
- *For a healthcare sector client* — Developed Unified Communication & Collaboration (UCC) strategy and roadmap to modernize aging UC infrastructure. Developed a detailed roadmap, platform architecture covering deployment across 18 hospital sites, and budget requirements for the platform procurement, deployment, and end-user transition.
- *For a healthcare sector client* — Developed UCC and mobility strategy to align future-state communication services to stakeholder requirements for integrated services, ubiquitous network coverage, multichannel call center capabilities, and consistent UX.
- *For an education sector client* — Led the storage strategy and assisted with vendor sourcing and selection for the research data platform. The engagement resulted in a five-year Total Cost of Ownership (TCO) reduction by 44% and the development of a service enhancement program.
- *For an education sector client* — Led Infrastructure modernization strategy spanning three separate initiatives — Data center strategy, infrastructure service governance and delivery approaches, and modernization program oversight.
- *For a global Manufacturing company* — Led IT observability assessment focused around minimizing overlapping capabilities, improving service delivery and governance, and identifying cost optimization opportunities.
- *For a leading Storage Device Manufacturing company* — Developed infrastructure operation strategy to align capabilities to the business needs and leading practice, defined a deployment roadmap of corrective actions.
- *For a global Facilitator of Electronic Fund Transfers* — Assessed the production network operations of a global payment technology company; identified gaps with business needs and with leading practice and defined a roadmap of corrective actions.
- *For a global Consumer Products manufacturer* — Developed the future-state architecture, including target models for wide-area networking, network performance optimization, and Voice-over-IP (VoIP).

Doreen Sturgis

Expert Partner

State and Local Government, Gartner Consulting

Project Role: Digital Business SME



Doreen Sturgis is Gartner Consulting’s Digital Business and IT Strategy Practice Solution Lead for the State and Local Government clients, focusing on the U.S. region. Ms. Sturgis has 20 years of experience as an Information Technology, Strategy and Management Consultant, primarily serving local Government clients. Ms. Sturgis brings extensive hands-on leadership experience in the customer experience and contact center strategy, smart city strategy, Enterprise Resource Planning (ERP) strategy and procurement, digital government transformation, human-centered design approach for public services, IT strategy and roadmaps, IT solution design and development, project delivery, strategic account management, and enterprise-wide program management. Ms. Sturgis joined Gartner in 2017.

Prior to joining Gartner, Ms. Sturgis spent 18 years as an IT, Management and Operations Senior Executive with CGI, a global IT firm. As a Vice President of Consulting for CGI, Ms. Sturgis held numerous roles, including Practice Leader for ERP and Digital Government, working with CGI’s global teams to develop methodologies for digital government roadmaps and transition delivery frameworks and services to support digital technologies and human-centered design; Client Delivery Executive for the Southern California portfolio of local government clients; Strategic Account Manager for Southern California and Hawaii, responsible for coordinating all operational functions, including: human resources, finance, sales and marketing, and all consulting delivery functions.

Ms. Sturgis has a B.S. in Business Administration from the University of California at Berkeley and an M.B.A. from the University of California, Los Angeles.

Highly Desirable Knowledge, Experience and Qualifications	Yrs.
Demonstrated experience conducting system replacement feasibility studies or similar work in IT environments comparable to what is described in this Scope of Work.	5
Demonstrated experience working with WA state agencies on OCIO IT initiatives, preferably feasibility study.	0
Experience scoping systems integration projects.	15
Demonstrated experience articulating the major objectives of an IT investment and define the work necessary to achieve those objectives with a high degree of confidence.	10
Ability to provide detailed and concise contextual documentation and artifact generation (documents, charts, graphs, plans, etc.).	20
Experience assessing, evaluating, and/or architecting mission critical, high impact, highly visible systems.	20
Experience writing large, complex studies for state programs.	3
Experience evaluating risk and internal controls.	10
Strong analytical capabilities.	20
Excellent written, oral, and interpersonal communication skills.	20
Ability to fairly and impartially evaluate potential solutions that may be available from a variety of vendors.	10
Experience working under tight deadlines.	20
Ability to prioritize and manage multiple priorities.	10
Experience with and ability to facilitate diverse teams of business and IT professionals.	20
Additional Desired Consultant Experience	
Knowledge of telephony and Contact Center industry technologies.	3
Experience working with other Washington State agencies.	0
Experience working with other governmental organizations.	20

Recent project experience includes:

- *For the State of Nevada* — Served as lead Subject Matter Expert (SME) for developing the CX roadmap and contact center improvements for the State's Commercial Recordings Division
- *For the City of Chicago* — Serving as Lead Subject Matter Expert (SME) for the City's transformation initiatives, including the development of a Digital Services Playbook, citywide IT governance, and mobile app concept
- *For the City of San Francisco* — Serving as Customer Experience SME in support of the development of a digital transformation roadmap
- *For the Riverside County* — Serving as Customer Experience SME in support of the development of a CX Optimization Roadmap
- *For CPS Energy* — Serving as a SME to provide oversight for their current Digital & Data Transformation initiatives
- *For City of Las Vegas* — Serving as a SME to develop their citywide IT Strategy
- *For the State of Minnesota* — Served as CX SME to support strategy for central IT to improve internal customer experience
- *For the Los Angeles Department of Water and Power* — Served as the Lead SME for multiple transformation initiatives, such as the development of a Digital Customer Experience Roadmap, requirements development for its website re-design, human-centered design to support the future state requirements and solicitation development for the Department's ERP replacement initiative, and vendor evaluation and selection support.
- *For the County of San Diego* — Served as a Subject Matter Expert to help define its priorities and approach for Digital Services and the Digital Workplace as part of its IT Strategic Plan refresh for 2021-2024. Previously assisted in increasing ideation and throughput for their countywide innovation program.
- *For the State of Arizona* — Served as a Subject Matter Expert to use human-centered design for developing the requirements for a Citizen Portal and defining a roadmap for improving the citizen experience.
- *For the City of Los Angeles* — Served as the Lead Subject Matter Expert for Smart City/Digital Government strategy and roadmap development.
- *For the City of Phoenix* — Served as the Lead Subject Matter Expert for its Smart City/IT strategy and roadmap development.
- *For the County of Los Angeles* — Served as the Subject Matter Expert to design an innovation accelerator to support the County's efforts to transform its public services through collaboration with internal and external stakeholders.
- *For the City of Henderson* — Served as the Engagement Manager and SME to develop the City's Smart City Strategy and roadmap

Ms. Sturgis helps build next level leadership and served on Gartner Consulting's Diversity, Equity, and Inclusion (DEI) Council, Crew Captain for Gartner's leadership program, sponsor for the Little Manila Foundation, mentor for the Women in Technology program for UCLA's IS Associates, mentor for CyberGirlz (focusing on building IT career aspirations across underserved communities) and sponsor for the East LA-based Las Fotos Project to empower teenage girls through art and photography.

Christopher Krantz

Associate Director

State and Local Government, Gartner Consulting

Project Role: Enterprise Architecture SME



Christopher Krantz has over eight years of experience in systems administration, project work, and IT service delivery. Mr. Krantz has an extensive background in integrating and managing midsize and enterprise-level IT solutions, with emphasis in IT infrastructure and operations, IT Service Management (ITSM) and Enterprise Applications (EAs). He joined Gartner in 2018.

Mr. Krantz has a degree in Computer Science from Rutgers University and an M.B.A. with a specialization in Analytics and Information Management from Rutgers Business School. He also holds MS Azure Fundamentals (AZ-900), MCSA and ITIL v3 certifications.

Highly Desirable Knowledge, Experience and Qualifications	Yrs.
Demonstrated experience conducting system replacement feasibility studies or similar work in IT environments comparable to what is described in this Scope of Work.	4
Demonstrated experience working with WA state agencies on OCIO IT initiatives, preferably feasibility study.	-
Experience scoping systems integration projects.	4
Demonstrated experience articulating the major objectives of an IT investment and define the work necessary to achieve those objectives with a high degree of confidence.	4
Ability to provide detailed and concise contextual documentation and artifact generation (documents, charts, graphs, plans, etc.).	12
Experience assessing, evaluating, and/or architecting mission critical, high impact, highly visible systems.	8
Experience writing large, complex studies for state programs.	4
Experience evaluating risk and internal controls.	8
Strong analytical capabilities.	12
Excellent written, oral, and interpersonal communication skills.	12
Ability to fairly and impartially evaluate potential solutions that may be available from a variety of vendors.	8
Experience working under tight deadlines.	12
Ability to prioritize and manage multiple priorities.	12
Experience with and ability to facilitate diverse teams of business and IT professionals.	12
Additional Desired Consultant Experience	
Knowledge of telephony and Contact Center industry technologies.	4
Experience working with other Washington State agencies.	-
Experience working with other governmental organizations.	4

Recent project experience includes:

- For a State Treasury** — Assessed the current state contact center for the pensions and benefits division across people, process and technology components identifying gaps and challenges, and provided actionable recommendations with a roadmap for the client to improve their call center capabilities and the overall service and support provided to their customers.
- For a large City Fire department** — Provided third-party Independent Verification & Validation services for the implementation of a plan review and inspection system, including deliverable reviews, architecture and design reviews, support of key meetings with the contracted System Integrator, and risk management support. Provided oversight for the organization’s shift from a waterfall development methodology to an agile

methodology in order to speed up the time to deployment during the COVID-19 pandemic to reduce in-person customer interactions.

- *For a large City Transportation agency* — Assessed the current state business processes and supporting technology for inter-agency street infrastructure projects. Created a target state vision for processes, technology and data for the capital street infrastructure program, identified gaps between the current and target states, and developed recommendations and a roadmap to achieve the target state.
- *For a leading Research University* — Assessed the current state implementation of Microsoft 365 (M365) across people, processes and technology. Developed guiding principles and a target state vision for how M365 should be implemented and supported at the university. Created recommendations and a roadmap to achieve the target state vision.
- *For one of the largest Community College Systems in the U.S.* — Participated in the development of an IT strategy, organization design, governance model, and transition roadmap to set a long-term technology strategy that supports strategic objectives.
- *For a large Federal agency* — Assessed the maturity level of ITSM processes and service desk to identify strengths to build upon and gaps to address and provide recommendations to improve ITSM processes to meet organizational priorities and improve overall IT service delivery.
- *For large Research University* — Assessed the current usage and capabilities of a leading ITSM tool relative to the University's current and future needs and developed recommendations to expand the use of the tool across the University, to enhance user satisfaction and deliver a reliable, scalable solution.
- *For a State Government Shared Services agency* — Created a service-level reporting and dashboard proof of concept, developed a service-level reporting tool and implementation strategy, with an emphasis on automation, standardization and scalability.

5.0 Vendor Information Response Form — Schedule A (5.5)

Schedule A — Vendor Information Response Form

1. VENDOR INFORMATION	
Official name of the Vendor company	Gartner, Inc.
Official mailing address	56 Top Gallant Road, Stamford, CT 06902-7700 Local office: 2001 Sixth Avenue, Suite 2200, Seattle, WA 98121
Federal Tax Identification Number (TIN)	04-3099750
Washington State Uniform Business Identification Number (UBI) <i>If Vendor does not have a UBI number, state commitment to become registered prior to contract signing if selected as the ASV.</i>	601422801 Gartner is licensed to conduct business in the State of Washington. Please see our Washington State Business License on the following page.
Washington State <u>Statewide Payee</u> number <i>If Vendor is not yet registered as a Statewide Payee, state commitment to register and provide DOR the assigned Statewide Payee Number prior to contract signing if selected as the ASV.</i>	Gartner is registered with the Washington Office of Financial Management Statewide Payee Services. Our SWV Number is SWV0003260.
Name and job title of the official contact person	Chris Ragan, Senior Managing Partner
Telephone and cell numbers of the contact person	+1 916 420 1860
Email address of the contact person	chris.ragan@gartner.com
Vendor Website Address	www.gartner.com

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

Figure 10. Gartner Washington State Business License



UBI: 601422801 001 0001

GARTNER, INC.
GARTNER
56 TOP GALLANT PO
STAMFORD CT 06904

STATE OF WASHINGTON

UNEMPLOYMENT INSURANCE - ACTIVE
INDUSTRIAL INSURANCE - ACTIVE
TAX REGISTRATION - ACTIVE
SPOKANE GENERAL BUSINESS - NON-RESIDENT - ACTIVE

Expires: Feb 28, 2023

Vicki Smith
Director, Department of Revenue

2. SUBCONTRACTOR IF VENDOR IS PLANNING TO USE SUBCONTRACTOR(S) FOR ANY PART OF THIS SCOPE OF WORK, COMPLETE THIS SECTION. DOR RESERVES THE RIGHT TO REQUEST ADDITIONAL INFORMATION FOR ANY PROPOSED SUBCONTRACTORS. BY INCLUDING SUBCONTRACTOR(S) AS PART OF YOUR PROPOSAL, VENDOR AGREES TO ASSUME RESPONSIBILITY FOR ALL CONTRACT OBLIGATIONS AND ANY LIABILITY FOR ALL ACTIONS OF SUBCONTRACTORS. ADD ROWS IF MULTIPLE SUBCONTRACTORS ARE ANTICIPATED.

IF VENDOR WILL NOT BE USING ANY SUBCONTRACTORS, CHECK HERE

Subcontractor Company Name	N/A
Brief description of subcontractor company	N/A
Name(s) of consultant(s) provided by subcontractor company.	N/A
Describe the work to be performed by the subcontracted consultant(s)	N/A
Describe strategies the Vendor will use to manage and monitor the work to be completed by the subcontracted consultant(s)	N/A

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

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

Remainder of page intentionally left blank

3. VENDOR QUALIFICATIONS

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

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

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

Gartner Consulting serves senior executives leading technology-driven strategic initiatives — **leveraging the power of Gartner’s actionable, objective insight**. Through **custom analysis** and **on-the-ground support** we enable optimized technology investments and stronger performance on our clients’ most critical priorities.

Our **760+ consultants** perform 2,100+ management and technology-driven strategic consulting and contract optimization engagements annually with executives and their teams. We bring together research insight, benchmark data, problem-solving methodologies, and hands-on experience to improve our clients’ return on their IT investments.

Government and public sector are a key industry focus for Gartner. Including national, federal, state, regional, and local government agencies (cities, counties, municipalities, etc.) and organizations around the world, this sector encompasses multiple government programs, including revenue and taxation, health and human services, public safety, justice, transportation, pensions and retirement, and environmental and defense. While drivers for, and constraints to, IT investment and adoption depend on regional and programmatic imperatives, government and public-sector organizations share IT decision-making processes and priorities that clearly differentiate them from the private sector. Gartner has guided billions of dollars in expenditures while helping government leaders around the world solve their most complex business and IT issues.

Gartner has provided services to public sector clients for nearly 40 years. Gartner has an expansive and successful track record of helping federal, state, and local government clients maximize their use of information technology.



The team was knowledgeable of our organization and was able to provide their technical expertise within a context that was meaningful and relevant

Chief Deputy Director
U.S. Public Sector Client



The level of expertise and experience Gartner brought as well as their willingness and ability to work with us when we needed further discussion / elaboration was what we liked best about the engagement.

Security Manager
U.S. Public Sector Client



Approximately half of Gartner Consulting’s business comes from government, and the State and Local segment is the largest component of this. We have performed **over 2,500 engagements for public sector clients in the last five years**, ranging from short, targeted strategic support to multi-year programmatic support of implementation efforts.

These experiences have resulted in strong methodologies that can be reliably executed. Gartner’s breadth of clients and engagements has allowed us to develop the deep understanding of the challenges, practices, and dynamics within state and local government. DOR requires a partner that understands the complexity of advancing IT trends, nuances of technology initiatives at the state level, and government funding characteristics. Gartner will leverage leading strategic planning methodologies and bring our expertise from supporting jurisdictions with similar projects throughout North America.



Gartner provided open communication and team collaboration. The staff was very professional and knowledgeable, offering a well thought out and executed plan.

*Senior IT Project Manager
U.S. Public Sector Client*



Our team of practitioners who **specialize in work related to Contact Centers** have assisted clients across North America in assessing, improving, and sourcing Contact Center solutions and services, by:

- Developing a proven set of over 300 key requirements that can be customized for our clients to leverage in Contact Center procurements.
- Defining the benefits of cloud-based solutions.
- Expanding coverage to new multimedia services and the integration of Artificial Intelligence.
- Defining Roles and Responsibilities based on current best-practice contracts.
- Establishing industry norms for provider service levels.

Gartner Consulting has been **servicing the State of Washington for 17 years**. Recent examples of work with Washington State government agencies includes:

- Washington Technology Solutions (WaTech) — Zero Based Budget Review
- Department of Revenue — Sales Suppression Feasibility Study
- Office of the Superintendent of Public Instruction (OSPI) — SAFS Modernization Feasibility Study
- Department of Children, Youth, and Families — Child Welfare Case Management system planning and feasibility study (in flight)
- Department of Labor & Industries — Workers Compensation System Modernization replanning and feasibility study (WCSM in flight)
- Department of Social and Health Services (DSHS) — Strategic IT Roadmap and Integrated Eligibility and Enrollment QA Services (in flight)

Gartner has provided feasibility study services for 30+ years. Gartner has extensive experience performing feasibility studies and related services for public sector agencies. In addition to the consultant references provided on Schedule D, the table below provides relevant projects that further demonstrate Gartner’s qualifications and capabilities.

Table 5. Relevant Gartner Projects

Client	Feasibility Study	
	Market Analysis and Environment Scan	Information Management Software Evaluation
Washington Department of Revenue	✓	✓
Washington Department of Children, Youth, and Families	✓	✓
Washington Department of Labor & Industries	✓	✓
Washington Office of the Superintendent of Public Instruction	✓	✓
State of Iowa Department of Revenue	✓	✓
State of Nevada Department of Taxation	✓	✓
Commonwealth of Virginia Department of Taxation	✓	✓
Loudoun County (VA) Treasurer, Assessor and Commissioner of the Revenue	✓	✓
Los Angeles County Department of Health Services	✓	✓
Los Angeles County Department of Public Health	✓	✓
State of Alabama Department of Mental Health	✓	✓
State of Arizona Department of Economic Security	✓	✓
State of Arkansas Health Information Exchange	✓	✓
State of California Department of State Hospitals	✓	✓
State of Connecticut Department of Mental Health and Addiction Services	✓	✓
State of Connecticut Health Information Exchange	✓	✓
State of Georgia Department of Public Health Care	✓	✓
State of Illinois Department of Human Services Division of Mental Health	✓	✓
State of Ohio Department of Health	✓	✓
State of Pennsylvania Health Information Exchange	✓	✓
State of Tennessee Department of Children's Services	✓	✓
State of Texas Department of State Health Services	✓	✓
State of Texas Health and Human Services	✓	✓
State of Vermont Integrated Eligibility	✓	✓

In addition to the feasibility study experience above, following are sample case studies that highlight Gartner’s contact center experience.

Figure 11. Case Study #1: Contact Center Strategy & Vendor Selection for a U.S. City

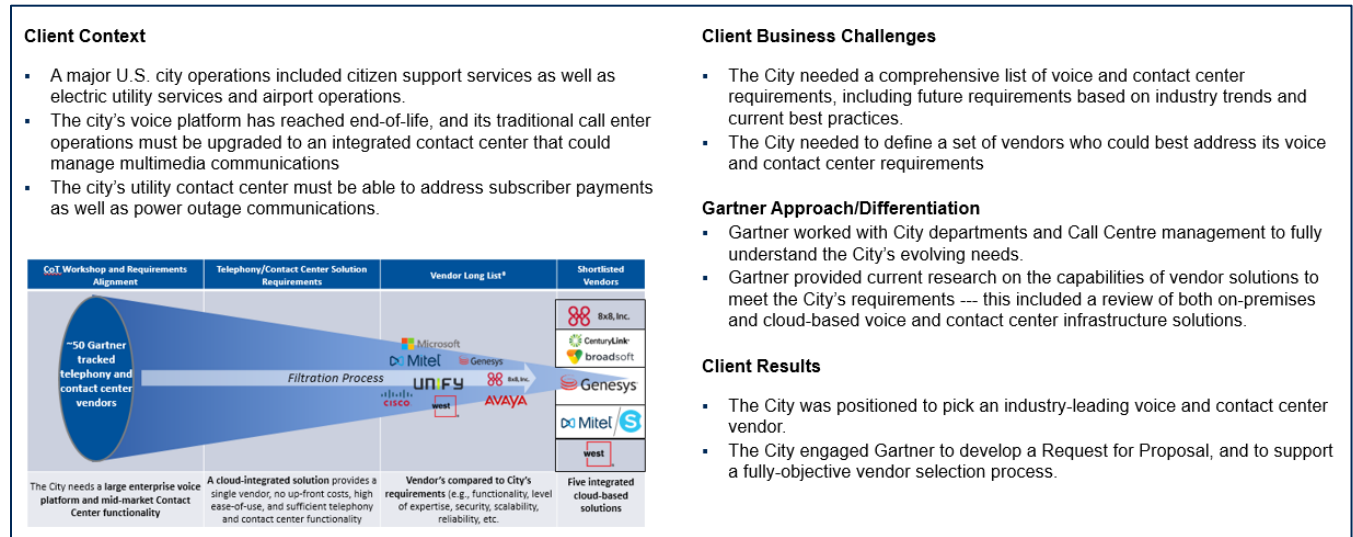


Figure 12. Case Study #2: Contact Center Capabilities and Market Price Assessment for a Large Health Payer

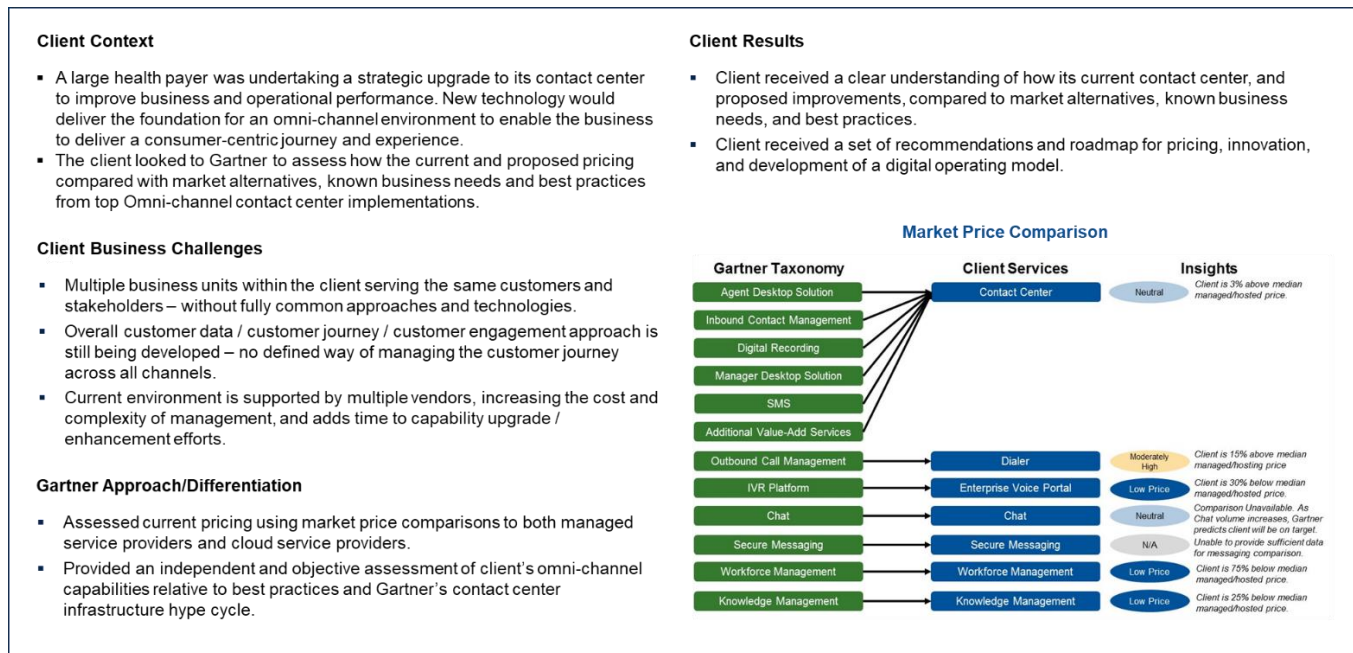
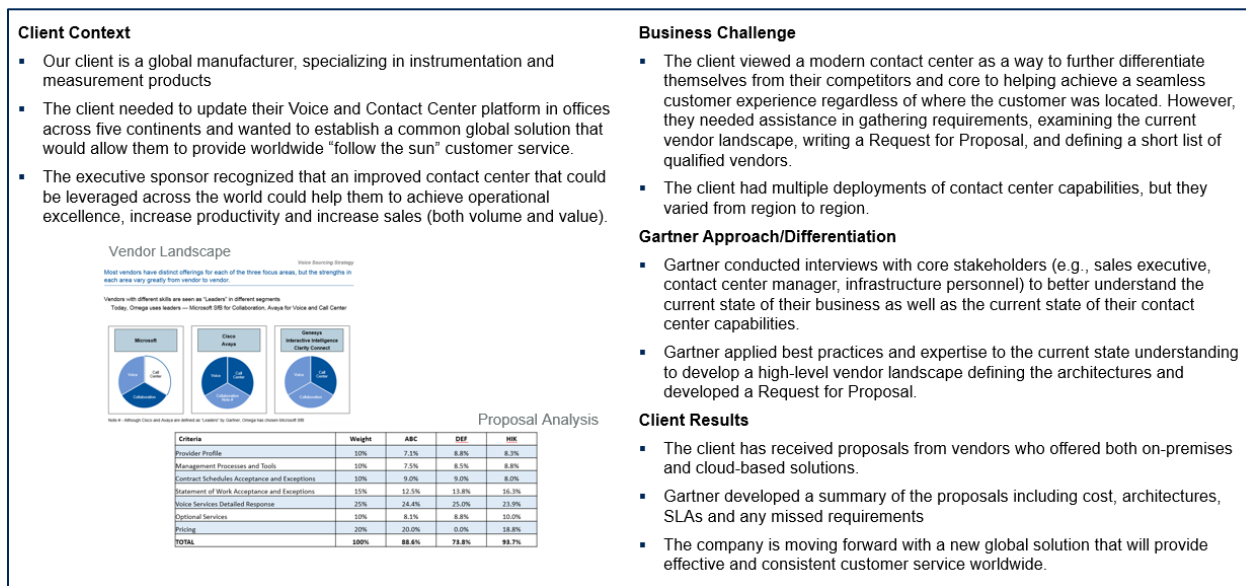


Figure 13. Case Study #3: Assisting a manufacturer to select a global communications platform for Voice and Contact Centers across five continents



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

Gartner is bringing to DOR a team that is steeped in both strategic and technical depth in contact center modernization and feasibility studies. The Gartner team will be overseen by Chris Ragan, a Senior Managing Partner who brings personal experiences from serving clients in the public sector, specifically in Revenue and Taxation, and has successfully advised on numerous feasibility study projects.

Mr. Ragan will oversee this project that will be led by Eric Cameron. Mr. Cameron brings depth and breadth of experience with feasibility studies, vendor scans, market research, and program oversight, having done similar work at multiple organizations. Mr. Cameron will lead and be supported by a strong team of leaders and experts.

Our core members will be supported by Gartner's dedicated State and Local Government practice, a community of associates with public sector experience that have served more than 1,000 government agencies worldwide. Gartner brings capacity and a capability that very few can match relative to your unique needs.

Team Oversight and Management

Eric Cameron, the Engagement Manager, will manage the project's progress and drive momentum. In addition, Chris Ragan, the Managing Partner, is responsible for achieving client satisfaction as well as project oversight to provide an additional layer of assurance and quality.

Working closely together, Mr. Cameron and Mr. Ragan are entrusted with the responsibility of overseeing the assigned staff, achieving client satisfaction, and addressing any issues that may arise. Key responsibilities of Mr. Cameron include, but are not limited to:

- Ensuring that Gartner activities support the client's goals.
- Building and maintaining a long-standing relationship with the client.
- Providing high-level oversight of the project.

- Taking action as needed to resolve issues.
- Involving the right subject matter experts at the right time to enhance value the DOR receives

Operationally, Mr. Cameron and DOR's Project Lead will drive the efforts and participate in regular progress review and risk management. They will agree upon a format and schedule acceptable to DOR in order to report progress on the metrics agreed.

Establishing the Gartner Team

- Gartner confirms team members, high-level roles and responsibilities.
 - Gartner will work with DOR to ensure the right people are in place to create the desired results.
 - Gartner works with our internal Professional Development team on associate staffing, offering local leadership to support all people-related initiatives and enhanced efficiency and effectiveness of associate staffing (i.e., matching DOR needs with associate availability and interests).
 - Gartner establishes a **Role Matrix** or **RACI-V Matrix** to help the team understand what is expected for each role. This matrix is tailored by the Engagement Manager to meet the needs of each engagement.
4. If DOR requested that you replace any of the consultants assigned for this scope of work, how you would approach this to ensure continuity of this project, avoid project delays, and prevent negative impact to the quality of the deliverables?

Gartner seeks to ensure that the assigned resources are available and are the right fit for DOR needs. We have an internal Professional Development (PD) function that manages the number of projects that our consultants are assigned to at any given moment. This optimizes value to the clients and resource utilization, reducing the likelihood of competing client demands. The PD team has authority over all project leaders and is constantly aware of utilization, upcoming workload, and the availability of alternatives, ensuring that — barring unforeseen circumstances — the team put to the client is the team who will deliver end-to-end throughout the engagement. This will ensure the team is thoroughly embedded with DOR. In situations where competing demands arise which might impact DOR, our project leadership team will work with DOR to communicate and develop a plan that remains aligned with the agreed scope and schedule. Gartner carefully selects resources to reduce the likelihood of competing demands that may arise and have an impact on DOR.

From our extensive project experience, Gartner sees two common scenarios in which changes to personnel may be required, therefore we have incorporated responses to them into the standard assumptions governing our projects.

- Firstly, our initial Proposal/Statement of Work assumes commencement of work upon a project start date set by DOR in their RFP documentation. If the actual project start date is different, proposed consulting team members may not be available. In this event, upon being made aware of the revised start date, Gartner commences an immediate evaluation of the proposed personnel to re-confirm their availability or otherwise. If a conflict has arisen due to the delay, then we are able to identify the skill set and experience that that individual was intended to provide. Our deep-bench of over 760 consultants allows us to then identify alternative personnel with appropriate skills and background and we will then present those alternatives to DOR.
- Secondly, during the course of a project, if an unforeseen situation arises in which a consultant must be withdrawn (i.e., due to sickness or injury; termination of employment; etc.) the priority for Gartner is to minimize the impact on the project in terms of delivery, quality, and timelines. Again,

our ability to draw on an extensive pool of options allows us to rapidly target appropriate replacements. Also, where possible, we ensure that individuals leaving Gartner work an appropriate notice period so that transition arrangements can come into play with the individual being required to coach and transfer knowledge to their replacement. A further factor allowing us to switch personnel in a smooth and professional manner is that Gartner projects are based around a specific cluster of roles with which our consultants are deeply familiar, and training is required for each of those roles — this means others are able to step into an unexpected vacancy with full knowledge of what is expected of them and a full awareness of the methodologies and approaches associated with it.

- In any situation where DOR is unhappy with a member of the team, Gartner, understandably, will prioritize making a change and will record and document this need within our ongoing project reporting and escalation processes so that it can be handled sensitively and efficiently. If a conflict should arise, then the needs of DOR take full priority and we will work with our PD team to ensure a smooth replacement takes place.

5. How long has your company been in business?

Founded in 1979, Gartner has been in business for 43 years.

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

Gartner brings focus in both Customer Experience services and Assessment, Tax & Revenue organizations — a unique combination that will deliver tailored, insightful, and relevant recommendations to WA DOR.

Dedicated Assessment, Tax & Revenue Practice

Gartner Consulting’s Assessment, Tax & Revenue (ATR) Center of Excellence brings the proven experiences that have been developed while supporting Tax & Revenue clients through the whole life cycle of integrated tax and technology strategies, spanning the development of transformational vision and goals, the building of requirements, data management and migration strategy, architectural analysis, and supporting tax system implementations. This experience tangibly translates into a proven team that can help WA DOR achieve its envisioned goals, outcomes, and benefits for staff, practitioners, and citizens alike.

Experience Spotlight

Gartner developed a strategic business case and solution feasibility assessment to support the modernization of the Iowa Department of Revenue’s tax processing systems, which processes over \$10B in tax revenue from the collection of 21 taxes and fees. With special emphasis on supporting their new Chief Data Officer, Gartner assisted the Department in successfully procuring a new ITS solution from FAST Enterprises and in properly preparing for their implementation journey.

Gartner has deep tax system experience working with numerous clients to minimize the challenges of new tax system technologies and mandates, while focusing on how to optimally realize the benefits to the State and its constituents.

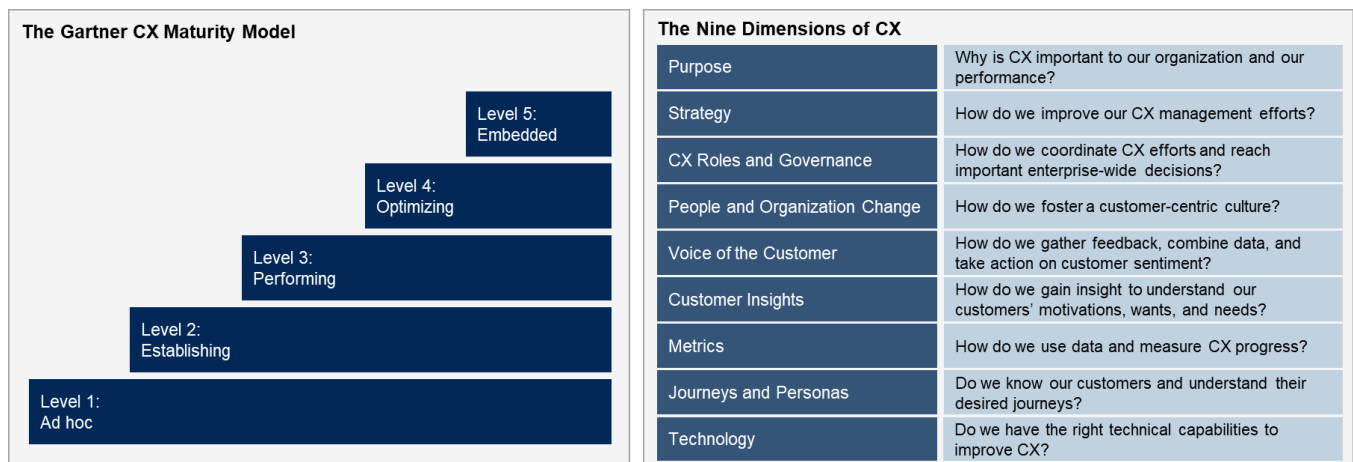
Customer Experience Qualifications

Customer service improvements within the contact center represent a critical part of organizations’ digital business transformation investments. Rising contact center volumes, combined with shrinking IT budgets, drive demand for efficiency tools within the contact center that leverage artificial intelligence.

Customer Experience (CX) is a discipline that designs and develops physical and digital services from a customer perspective. Gartner’s methodology is fundamentally based on the Customer Experience (CX) Management Framework from Gartner Research. This is a proven framework developed as a result of interactions and insights from working with thousands of clients worldwide.

Gartner’s CX Maturity Model guides a step-wise journey for developing CX capabilities over time.

Figure 14. Gartner CX Maturity Model



7. Do you have any debarments or terminations for cause within the past three years? No Yes
If yes, please explain in detail.

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

None.

Remainder of page intentionally left blank

RCW 42.56.270(21), RCW 42.56.270(11)

CONFIDENTIAL INFORMATION

RCW 42.56.270(21), RCW 42.56.270(11)

CONFIDENTIAL INFORMATION

RCW 42.56.270(21), RCW 42.56.270(11)

CONFIDENTIAL INFORMATION

WR #K2073

NextGen Contact Center Feasibility Study

CERTIFICATIONS AND ASSURANCES

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

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

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

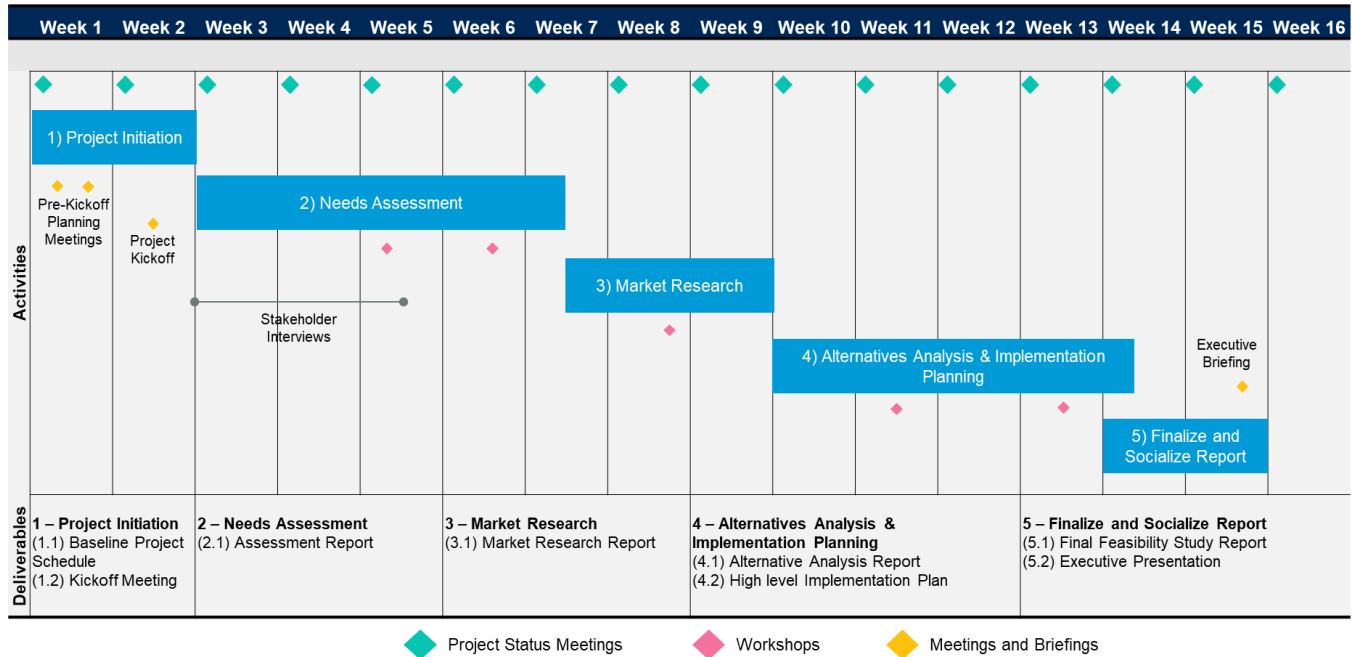
This form must be signed and dated by a corporate officer of a corporation, or a principal, manager, partner, or other individual representative of the Vendor with the authorization to execute and legally bind the Vendor.

Name and Title	Kristin Ghanem-Associate Director-Contracts	Date:	10/6/2022
Signature	Kristin Ghanem <small>Digitally signed by Kristin Ghanem Date: 2022.10.06 14:22:13 -0400'</small>		

6.0 Deliverable Cost and Timeline — Schedule B (5.6)

Gartner anticipates completion of this engagement within 15 weeks, as detailed in Figure 15. This schedule is dependent on the assumptions included in this Proposal.

Figure 15. Estimated Feasibility Study Project Schedule



Schedule B Deliverable Cost and Timeline

Deliverables (Deliverables are stated at summary level here. See section 3F, Deliverables, of Work Request for details of each deliverable).	*Hourly Rate	Number of Hours	Compensation per Deliverable	Timeline to complete deliverable
Deliverable 1. Project Management Plan and Schedule.	\$250	approx. 80-100	\$20,000	End of Week 2
Deliverable 2. DOR Business Background and Needs Assessment.	\$250	approx. 320-370	\$81,200	End of Week 7
Deliverable 3. Market Research Results Documentation.	\$250	approx. 370-410	\$93,500	End of Week 10
Deliverable 4. High-level Implementation Plan and Approach.	\$250	approx. 495-580	\$124,200	End of Week 13
Deliverable 5. Completed Feasibility Study and Presentation.	\$250	approx. 230-270	\$58,200	End of Week 15
Sales Tax (if applicable)				
Totals	NA	Total number of hours approx. 1,495- 1,730 hrs.	Total compensation \$377,100	Total numbers of weeks 15 weeks inclusive of parallel project activities

Please note: If you have identified additional deliverables that would be beneficial to DOR, please add them to the table above for consideration. Mark them as "for consideration".

DOR's intent is to identify Vendors with the necessary knowledge and experience at the lowest cost.

*** Maximum Hourly Rate — Gartner has provided a blended hourly rate for services**

The hourly rates to perform the work are not to exceed the rates in effect in the vendor's master contract as approved by DES on the date vendor responds to this Work Request. We encourage vendors to submit their best rate in response to this Work Request. Rates in excess of these DES master contract rates will be deemed non-responsive and the proposal will not be scored.

6.1 Investment Summary

6.1.1 Fees and Expenses

Gartner will conduct the engagement as outlined in this Proposal for a firm-fixed price of US\$ 377,100 (plus applicable taxes) inclusive of travel and other reimbursable expenses. This will be billed as defined in Section 6.1.2.

6.1.2 Billing

Gartner will conduct the steps outlined in this Proposal for the firm-fixed price defined in Section 6.1.1.

Gartner will bill for the professional fees at the conclusion of each milestone upon DOR's acceptance of the deliverable(s) for that milestone. Note, Client shall provide Gartner with notice of acceptance or non-acceptance within 5 days; provided however, if no response from Client is received by Gartner within such period, then acceptance of the deliverable is assumed.

6.1.3 Invoicing

Gartner will invoice Client for Services based upon agreed schedule which are stated exclusive of all taxes. Payment is due 30 days from invoice date. Where required Gartner shall charge and Client shall pay all applicable sales, use, value-added, or other tax(es) or charge(s) imposed or assessed by any governmental entity upon the sale, use or receipt of Services, with the exception of any tax(es) imposed on the net income of Gartner. While we do not provide itemized billing for services, we agree and will comply with any reasonable requests for records substantiating our invoices.

Unless the box is checked below: At the time of execution of this Proposal a Purchase Order (PO) document must be sent to your Gartner Primary Contact no later than 30 days from signature with the following reference: 330080036, US\$ 377,100. Any pre-printed or additional contract terms included on the PO shall be inapplicable and of no force or effect.

By checking this box, Client confirms that no PO is required, and the Billing Address and Invoice Recipient information is accurate.

Primary Contact

Heidi Whisman and Jennifer Macinata
Solicitation Coordinators
6500 Linderson Way SW
Tumwater, WA 98501
+1 360 596 3782
dorbidresponses@dor.wa.gov

6.1.4 Assumptions

The deliverables, schedule, and pricing in this Proposal are based on the following assumptions:

DOR's Participation:

- DOR will designate a project manager to act as the primary point of contact for this engagement. DOR's project manager will be expected to work closely with the Gartner employees as needed and will: (a) approve priorities, detailed step plans and schedules; (b) facilitate the scheduling of Gartner interviews with appropriate client personnel; (c) notify Gartner in writing of any engagement or performance issues; and (d) assist in resolving issues that may arise.

- The work effort described in this Proposal assumes DOR's personnel are available to assist in the manner defined in this Proposal. If DOR's personnel are not available, a change of scope may be necessary.
- DOR will review and approve all documents required to facilitate project execution (collectively "Project Documents") within 5 business days. If no formal approval or rejection is received within this time frame, the Project Documents are considered to be accepted by DOR to facilitate drafting of each Deliverable. All Deliverables, provided by Gartner to Client shall be deemed to be accepted within 15 days of receipt by Client unless Gartner receives written notice of non-acceptance within 15 days after their delivery.
- DOR will schedule DOR's resources for project activities and provide meeting facilities as necessary.
- DOR's personnel will be available per the final project schedule.
- Gartner will formally capture feedback on your overall experience via our client survey. This allows us to quantify our performance on this engagement and achieve a culture of continuous improvement of process and best practice.

Data Collection:

- The due diligence (as-is) data are reasonably available via interviews and documentation review.
- DOR will provide timely access to all appropriate personnel to be interviewed. These personnel will provide the data necessary to complete this engagement, answer questions, provide existing documentation and attend working sessions.
- Engagement pricing is based on the assumption that Gartner will conduct activities as specified in the scope of work over a period of 15 weeks. DOR will arrange all sessions with DOR's personnel.
- All data collection and interviews/workshops will take place via telephone or in person at the Washington Department of Revenue offices as described in this Proposal and/or as agreed to at the project kickoff.

Key Personnel:

- Resumes/biographies of key personnel provided in this Proposal are included solely for illustrative purposes and do not indicate the commitment of a specific named associate. Upon signing of a contract we will identify those associates with the appropriate skills and background to deliver fully on the undertakings defined in the Proposal.
- If unforeseen circumstances require the replacement of an associate on an engagement, Gartner will inform DOR as soon as reasonably possible and substitute appropriate associates with comparable skills.
- Gartner associates identified as Account Partners are not billed for as part of engagement pricing. Their guidance and support represent a significant value-add to the engagement.
- Where it is indicated in this Proposal, that a proposed team member is a sub-contractor to Gartner, DOR agrees to the inclusion of that individual as a member of the project team so long as the sub-contractor is suitably qualified to provide the services. If such inclusion is not reasonably acceptable to DOR, Gartner will be informed at the earliest opportunity and requested to find an alternative team member.

Place of Performance:

- Except for meetings and workshops, all Gartner services will be performed at Gartner locations.

- Office space, telephones, printing/copying services and access to the open internet will be made available on a reasonable basis to Gartner at DOR's locations for on-site project time.

Deliverables:

- Any requests for additional information or resource (beyond the details described in the tasks above) that are made by DOR will be considered a change in scope for this engagement and will be handled accordingly (see Changes to Scope section of this Proposal).
- All deliverables will be developed using Microsoft Office products (e.g., Word and PowerPoint).
- All Deliverables, provided by Gartner to DOR shall be deemed to be accepted within 15 days of receipt by DOR unless Gartner receives written notice of non-acceptance within 15 days after their delivery.
- Deliverables will not be made available to anyone outside of DOR's organization.

Gartner Independence and Objectivity:

- Gartner Research and Consulting recommendations are produced independently by the Company's analysts and consultants, respectively, without the influence, review or approval of outside investors, shareholders or directors. For further information on the independence and integrity of Gartner Research, see "[Guiding Principles on Independence and Objectivity](#)" on our website, [gartner.com](#) or contact the Office of the Ombuds at ombuds@gartner.com or +1 203 316 3334.

6.1.5 Changes to Scope

The scope of this engagement is defined by this Proposal. All DOR's requests for changes to the Proposal must be in writing and must set forth with specificity the requested changes. As soon as practicable, Gartner shall advise DOR of the cost and schedule implications of the requested changes and any other necessary details to allow both parties to make an informed decision as to whether they will proceed with the requested changes. The parties shall agree in writing upon any requested changes prior to Gartner commencing work.

As used herein, "changes" are defined as work activities or work products not originally planned for or specifically defined by this Proposal. By way of example and not limitation, changes may include the following:

- Any activities not specifically set forth in this Proposal.
- Providing or developing any deliverables not specifically set forth in this Proposal.
- Any change in the respective responsibilities of Gartner and DOR, including any reallocation or any changes in engagement or project manager staffing.
- Any rework of completed activities or accepted deliverables.
- Any investigative work to determine the cost or other impact of changes requested by DOR.
- Any additional work caused by a change in the assumptions set forth in this Proposal.
- Any delays in deliverable caused by modification of acceptance criteria in this Proposal.
- Any changes to research analysts' time or resources.

6.2 Authorization

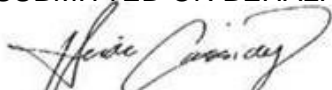
This Proposal is submitted under the terms and conditions of Washington State Department of Enterprise Services (DES) Master Contracts #08215 – Information Technology Professional Services, Category 1 :dated March 1, 2022, as amended May 1, 2022DayMonthYear.

This Proposal may be modified at any time provided such changes (i) are agreed by the parties in writing and (ii) where applicable, are in accordance with the Change to Scope provision.

This Proposal is valid for 90 days from October 7, 2022.

Gartner requires a signature on the SOW to place Client's order. To the extent, Client's practices are to request Services automatically via purchase orders, the purchase order will be considered as a valid and binding confirmation without a written signature. Any pre-printed or additional contract terms included on the purchase order shall be inapplicable and of no force or effect.

SUBMITTED ON BEHALF OF GARTNER, INC.



SIGNATURE

Heide Cassidy, Senior Managing Partner

PRINT NAME AND TITLE

October 7, 2022

DATE

AGREED ON BEHALF OF WASHINGTON STATE DEPARTMENT OF REVENUE

SIGNATURE

PRINT NAME AND TITLE

DATE

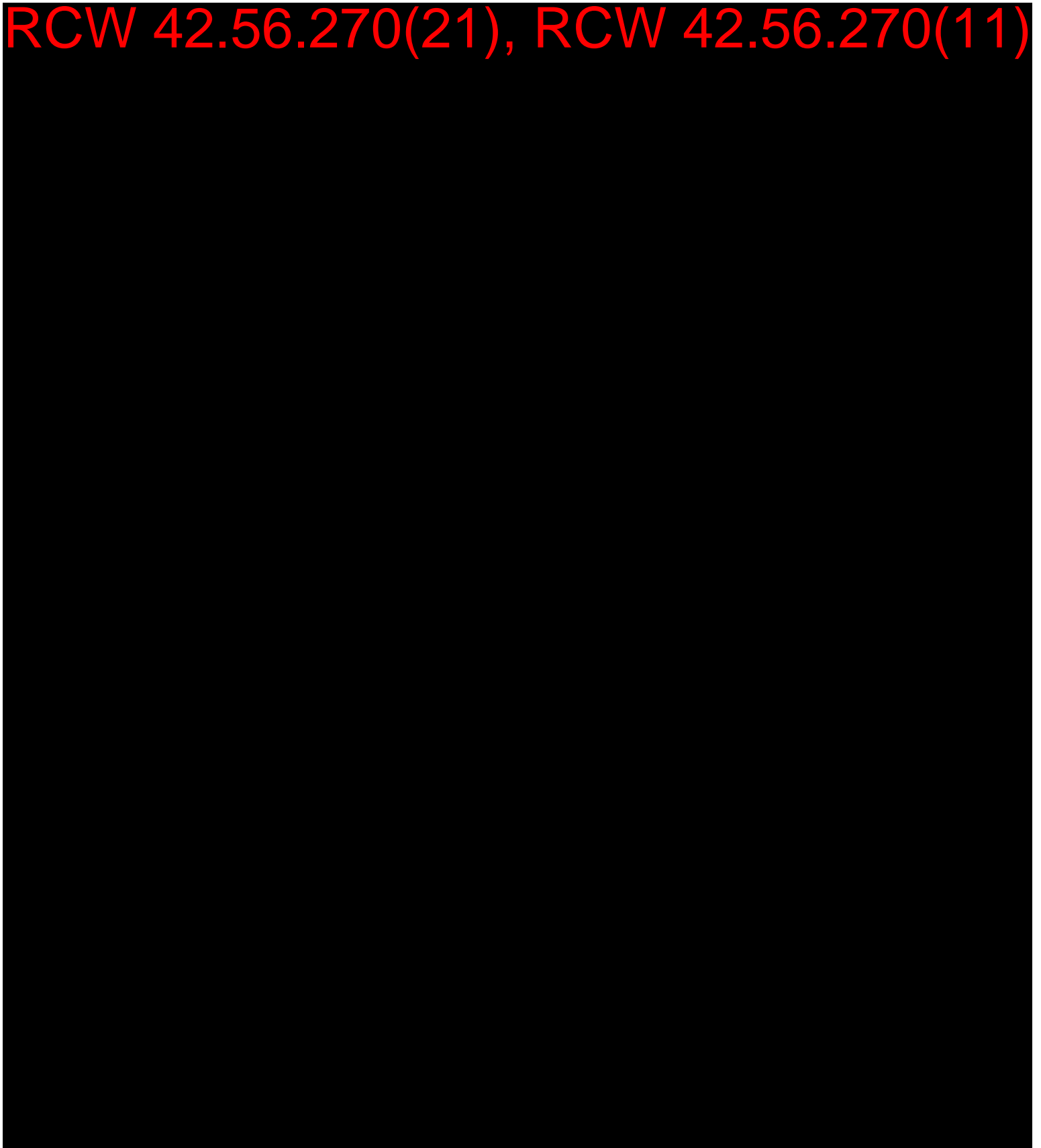
PO NUMBER (IF APPLICABLE)

7.0 Contract Issues List — Schedule C (5.7)

Gartner has reviewed Work Request K2073, including the Draft Contract. We have separately provided in an unrestricted, editable Microsoft Word attachment any issues, concerns, exceptions and objections we have to the terms and conditions contained in the Draft Contract.

Please refer to the attached file titled “SchedC_Contract_Issues_List_Gartner.docx”.

RCW 42.56.270(21), RCW 42.56.270(11)



CONFIDENTIAL INFORMATION

RCW 42.56.270(21), RCW 42.56.270(11)

CONFIDENTIAL INFORMATION

RCW 42.56.270(21), RCW 42.56.270(11)

CONFIDENTIAL INFORMATION

RCW 42.56.270(21), RCW 42.56.270(11)

CONFIDENTIAL INFORMATION

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CONFIDENTIAL INFORMATION

RCW 42.56.270(21), RCW 42.56.270(11)

CONFIDENTIAL INFORMATION

RCW 42.56.270(21), RCW 42.56.270(11)



CONFIDENTIAL INFORMATION

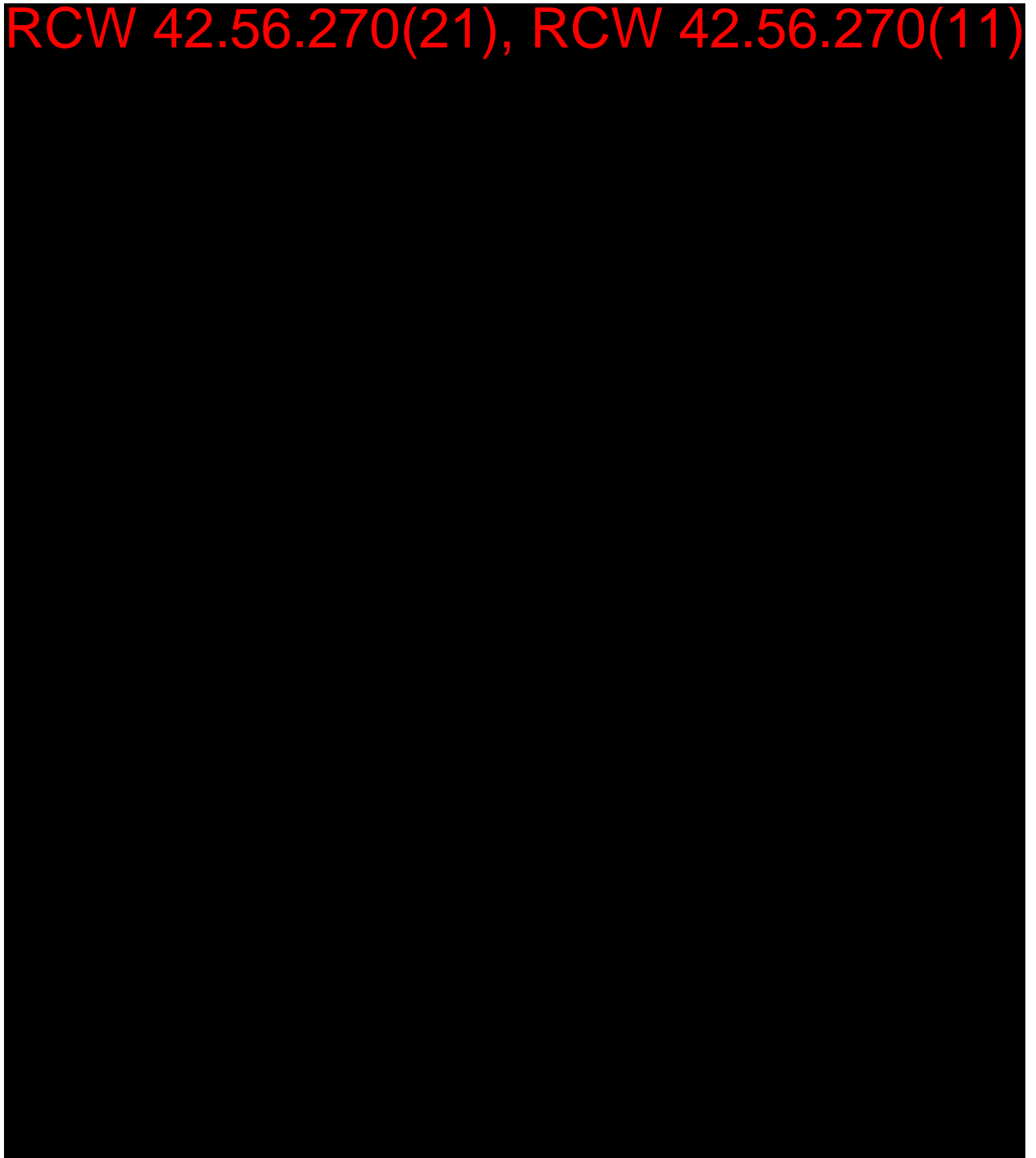
RCW 42.56.270(21), RCW 42.56.270(11)

CONFIDENTIAL INFORMATION

RCW 42.56.270(21), RCW 42.56.270(11)

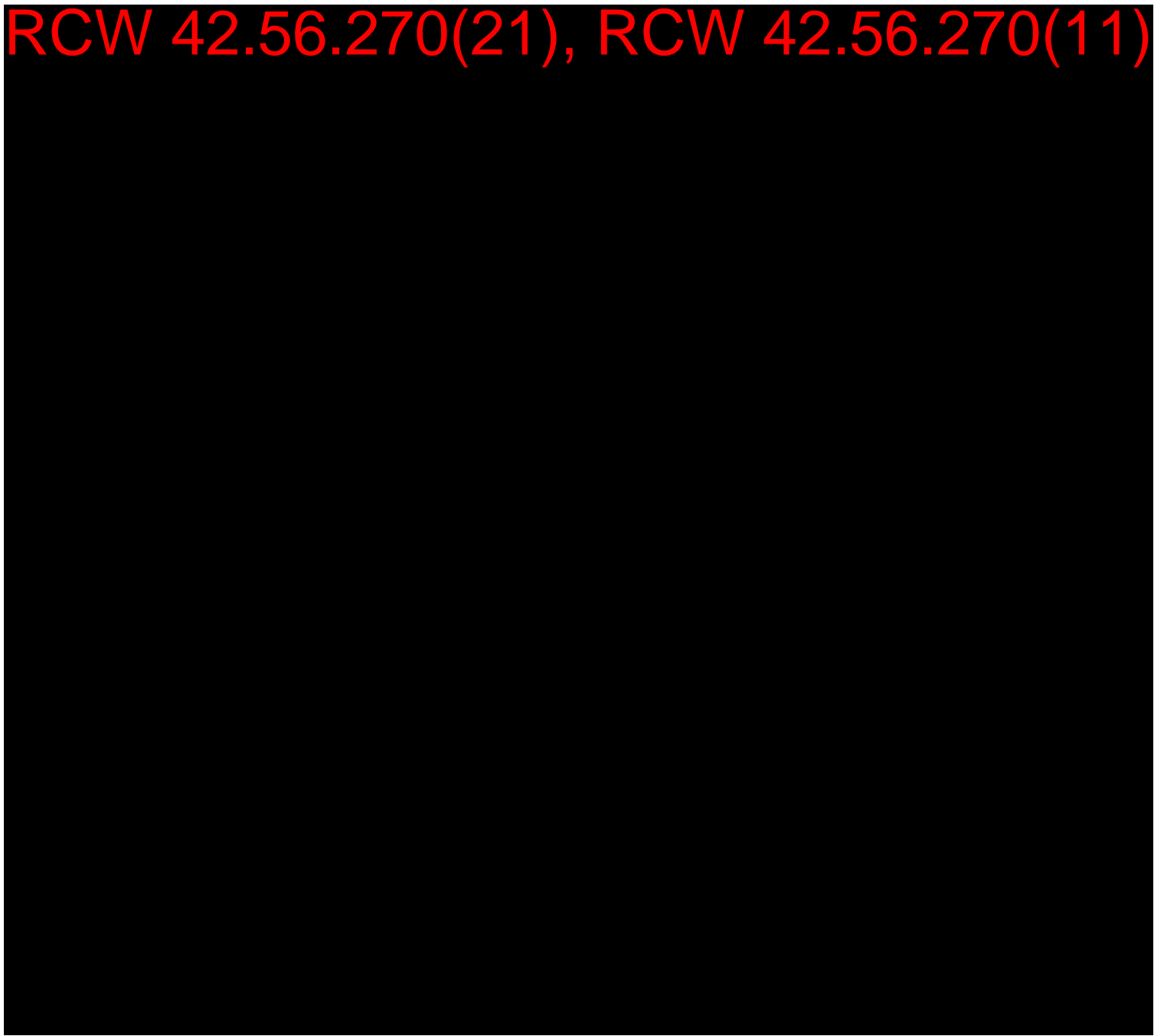
CONFIDENTIAL INFORMATION

RCW 42.56.270(21), RCW 42.56.270(11)



CONFIDENTIAL INFORMATION

RCW 42.56.270(21), RCW 42.56.270(11)



CONFIDENTIAL INFORMATION

RCW 42.56.270(21), RCW 42.56.270(11)

CONFIDENTIAL INFORMATION

RCW 42.56.270(21), RCW 42.56.270(11)

CONFIDENTIAL INFORMATION

RCW 42.56.270(21)

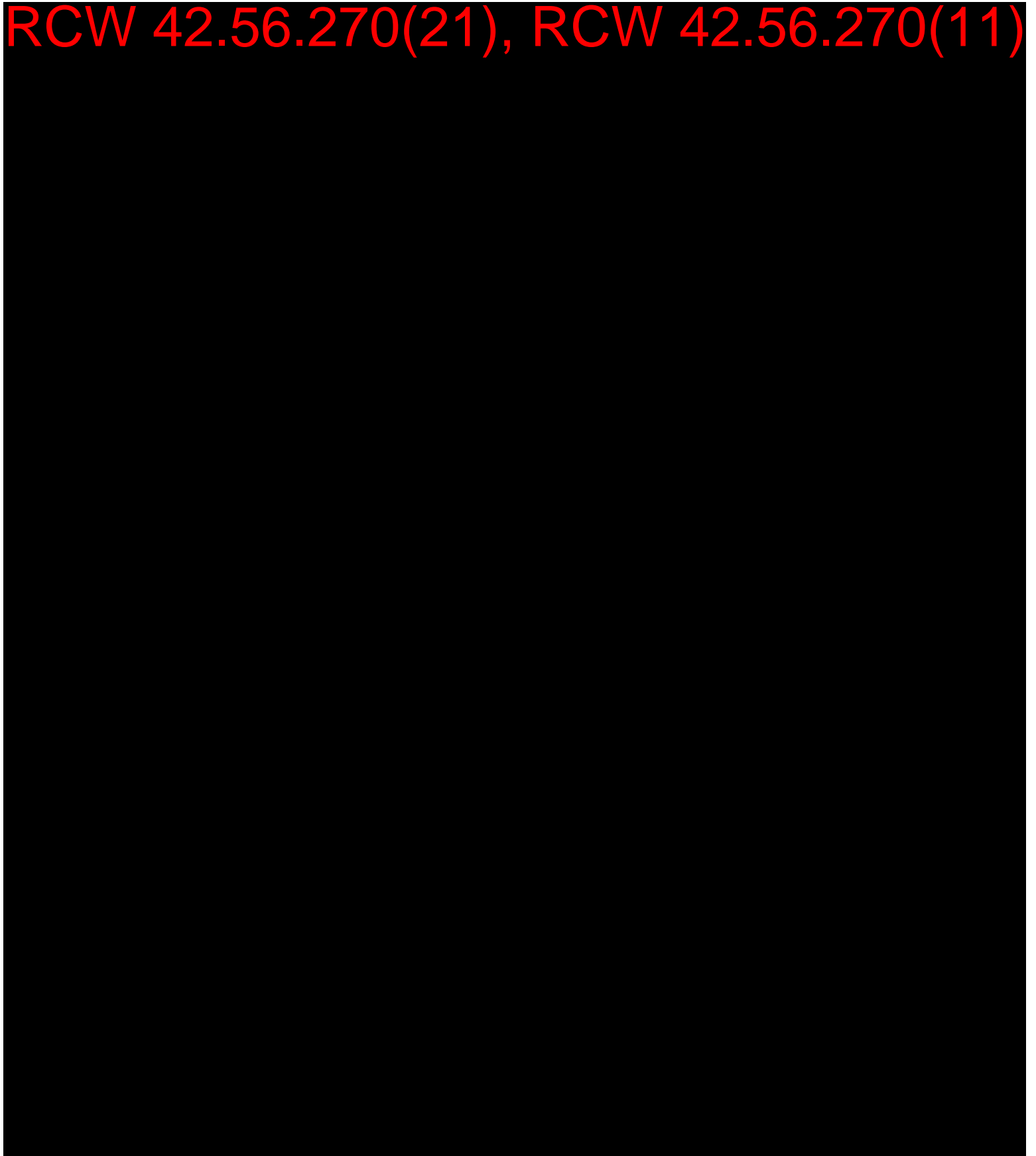
CONFIDENTIAL INFORMATION

RCW 42.56.270(21), RCW 42.56.270(11)



CONFIDENTIAL INFORMATION

RCW 42.56.270(21), RCW 42.56.270(11)



CONFIDENTIAL INFORMATION

RCW 42.56.270(21), RCW 42.56.270(11)



CONFIDENTIAL INFORMATION

9.0 Vendor Certification Executive Order 18-03 Workers' Rights Form — Schedule E (5.9)

DocuSign Envelope ID: CAE2D7C4-EE57-4384-B145-6F8F28F2F628

Work Request K2073

NextGen Contact Center Feasibility Study

SCHEDULE E

VENDOR CERTIFICATION

EXECUTIVE ORDER 18-03 – WORKERS' RIGHTS

WASHINGTON STATE GOODS & SERVICES CONTRACTS

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

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

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


OR

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

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

FIRM NAME: GARTNER, INC.

Name of Vendor – Print full legal entity name of firm

By: 
Signature of authorized person

Melissa McKay

Print Name of person making certifications for firm

Title: Manager
Title of person signing certificate

Place: Fort Myers, Florida
Print city and state where signed

Date: September 29, 2022

10.0 Vendor Certification Wage Theft Prevention Form — Schedule F (5.10)

DocuSign Envelope ID: CAE2D7C4-EE57-4384-B145-6F8F28F2F628

Work Request K2073

NextGen Contact Center Feasibility Study

SCHEDULE F

VENDOR CERTIFICATION

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

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

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

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

OR

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

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

FIRM NAME: GARTNER, INC.

Name of Vendor – Print full legal entity name of firm

By: 
Signature of authorized person

Melissa McKay
Print Name of person making certifications for firm

Title: Manager
Title of person signing certificate

Place: Fort Myers, Florida
Print city and state where signed

Date: September 29, 2022

11.0 Confidential Information List — Schedule G (5.11)

Vendor Name: Gartner, Inc.

Instructions:

Per Section 8A, Proprietary or Confidential Information in Proposal, of the Work Request, complete this form to identify all sections and pages of the Vendor proposal with Confidential Information. Vendor must mark each section and page of the Proposal as instructed in Section 8 in addition to completion of this form.

If there is no information in the proposal which the bidder desires to claim as confidential, state “No Confidential Information” on the first row of this form. When this form is submitted with a response of “No Confidential Information”, DOR **will not** review the proposal for any Confidential Information notations.

Page No.	Proposal Section, Title and No.	Cited Disclosure Exemption
Pg. 7-11	Section 3.0 Deliverable Examples (5.3)	RCW 42.56.270 (11) Proprietary data, trade secrets, or other information that relates to: (a) A vendor's unique methods of conducting business; (b) data unique to the product or services of the vendor; or (c) determining prices or rates to be charged for services, submitted by any vendor to the department of social and health services or the health care authority for purposes of the development, acquisition, or implementation of state purchased health care as defined in RCW 41.05.011.
Pg. 40-42	Section 5.0 Vendor Information Response Form — Schedule A (5.5), item 4. Vendor's References and Experience and Qualifications	RCW 42.56.270 (21) Market share data submitted by a manufacturer under RCW 70A.500.190(4). RCW 42.56.270 (11) Proprietary data, trade secrets, or other information that relates to: (a) A vendor's unique methods of conducting business; (b) data unique to the product or services of the vendor; or (c) determining prices or rates to be charged for services, submitted by any vendor to the department of social and health services or the health care authority for purposes of the development, acquisition, or implementation of state purchased health care as defined in RCW 41.05.011.
Pg. 51-67	Section 8.0 Consultant References — Schedule D (5.8)	RCW 42.56.270 (21) Market share data submitted by a manufacturer under RCW 70A.500.190(4). RCW 42.56.270 (11) Proprietary data, trade secrets, or other information that relates to: (a) A vendor's unique methods of conducting business; (b) data unique to the product or services of the vendor; or (c) determining prices or rates to be charged for services, submitted by any vendor to the department of social and health services or the health care authority for purposes of the development, acquisition, or implementation of state purchased health care as defined in RCW 41.05.011.



Appendix



12.0 Appendix

12.1 Dedicated Assessment, Tax & Revenue Practice

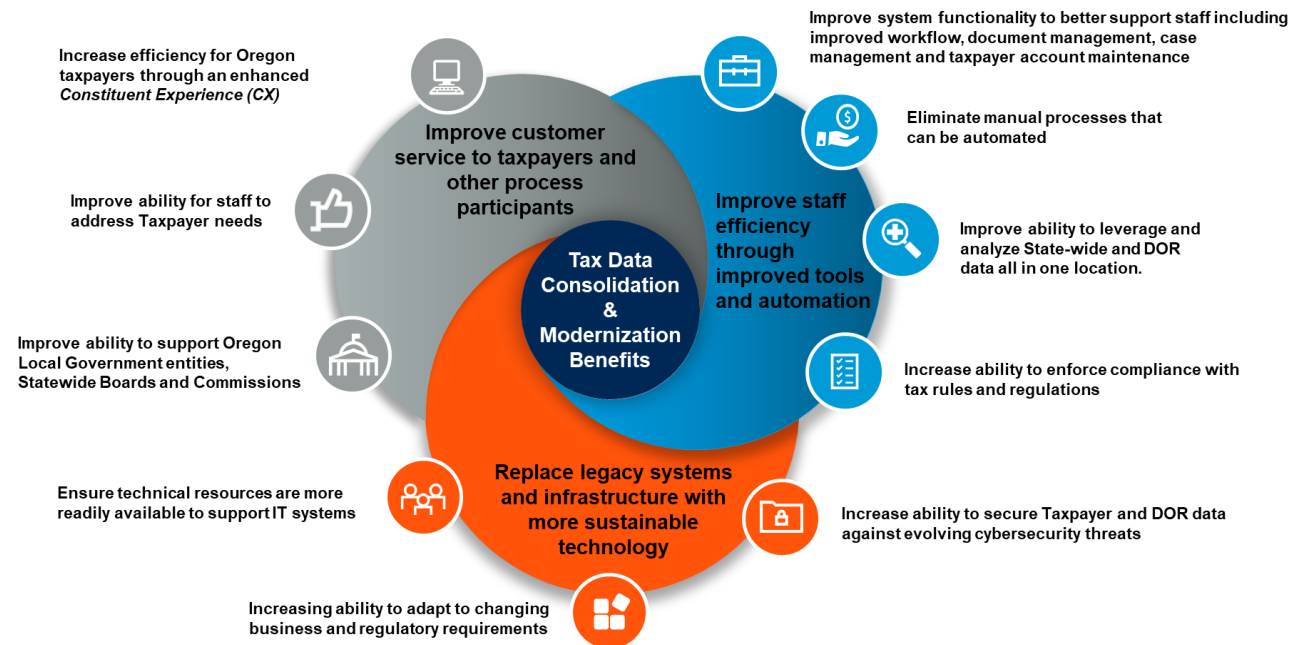
Gartner Consulting’s Assessment, Tax & Revenue (ATR) Practice brings the proven experiences that have been developed while supporting Tax & Revenue clients through the whole life cycle of integrated tax and technology strategies, spanning the development of transformational vision and goals, the building of requirements, data management and migration strategy, architectural analysis, and supporting tax system implementations. This experience tangibly translates into a proven team that can help WA DOR achieve its envisioned goals, outcomes, and benefits for staff, practitioners, and citizens alike.



Experience Spotlight

Gartner developed a strategic business case and solution feasibility assessment to support the modernization of the Iowa Department of Revenue’s tax processing systems, which processes over \$10B in tax revenue from the collection of 21 taxes and fees. With special emphasis on supporting their new Chief Data Officer, Gartner assisted the Department in successfully procuring a new ITS solution from FAST Enterprises and in properly preparing for their implementation journey.

Figure 16. Benefits of Tax Data Consolidation and Modernization



Gartner has deep tax system experience working with numerous clients to minimize the challenges of new tax system technologies and mandates, while focusing on how to optimally realize the benefits to the State and its constituents.

Some of our most relevant experience includes:

- **Multiple State Departments of Revenue:** Tax system modernization strategy and roadmap, data management and migration strategy, solution feasibility assessment, business case, and procurement support.
- **A State Department of Treasury:** Currently providing Independent Verification and Validation (IV&V) over the Michigan Treasury Modernization Project.
- **A State Department of Taxation:** Tax system modernization planning, business case, solution strategy, and modernization preparation roadmap development.
- **A Tax and Revenue Agency:** Quality Assurance and IV&V for new State Tax System including 20+ tax types.
- **An Office of the Chief Financial Officer:** Integrated state and local tax system strategy, business process reengineering, and IV&V for the implementation of a new tax system.
- **A Large City Department of Finance:** Tax system replacement strategy and quality assurance services.

12.2 Customer Experience Qualifications

Customer service improvements within the contact center represent a critical part of organizations' digital business transformation investments. Rising contact center volumes, combined with shrinking IT budgets, drive demand for efficiency tools within the contact center that leverage artificial intelligence.

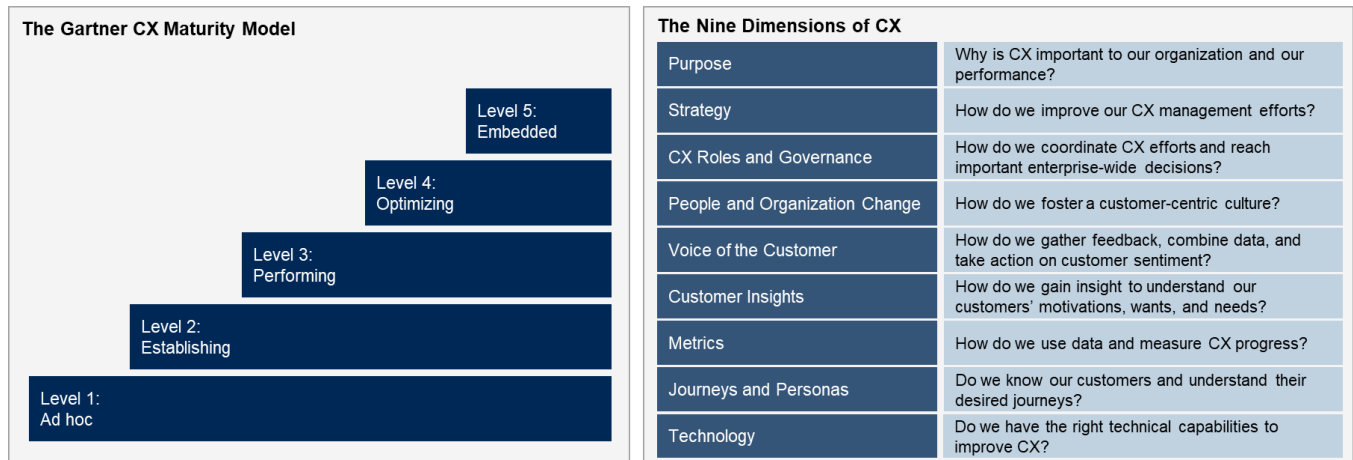
Customer Experience (CX) is a discipline that designs and develops physical and digital services from a customer perspective. Gartner's methodology is fundamentally based on the Customer Experience (CX) Management Framework from Gartner Research. This is a proven framework developed as a result of interactions and insights from working with thousands of clients worldwide.

Gartner's CX Maturity Model guides a step-wise journey for developing CX capabilities over time.

Figure 17. Customer Service and Support Technology



Figure 18. Gartner CX Maturity Model



Gartner has found that customer service improvements within the call centers of today represent a key focus of IT transformation investments. Rising contact center volumes, the impact of COVID-19 on staffing, as well as constrained IT budgets, are leading many of our clients to look for opportunities for efficiency and to leverage technologies, like artificial intelligence to improve outcomes.

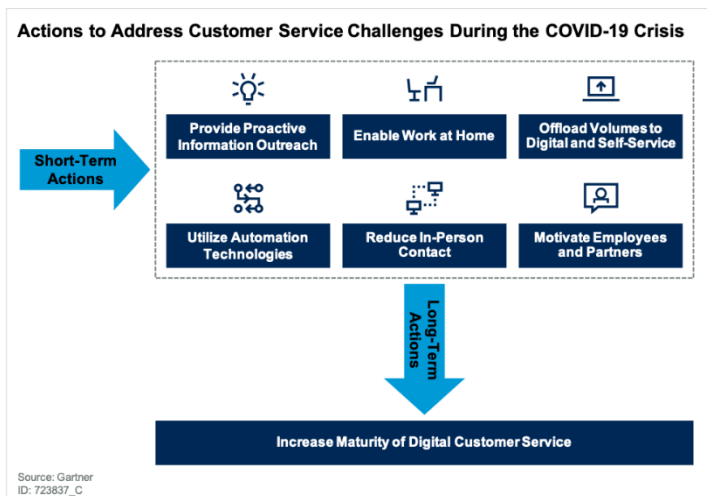
Gartner Consulting has been working with contact center teams during the pandemic to adjust to the “new normal.” While short-term actions have been vital for organizations to address COVID-19 challenges, a focus is also required on longer term action to increase maturity of digital customer service for the future.

Due to COVID-19, many customer service/contact center teams have faced large volumes of incoming requests, while operating at a reduced capacity. The pandemic will have a long-term impact on customers’ perceptions and expectations for digital service and self-service. As a result, digital channels play a critical role in the scalability of contact center operations today and will continue to be vital to future success. According to Gartner Research:

- By 2023, 30% of customer service organizations will deliver proactive customer service using artificial intelligence, process orchestration and continuous intelligence.
- By 2023, more than 60% of all customer service engagements will be delivered via digital and web self-serve channels, up from 23% in 2019.

As we meet with your stakeholders and review background documentation and data, we will leverage Gartner Research insights and recommendations, such as those recently published in the Gartner Research article *Market Trends: Contact Center Innovations Promise Better Customer Experience (ID G00723967)*:

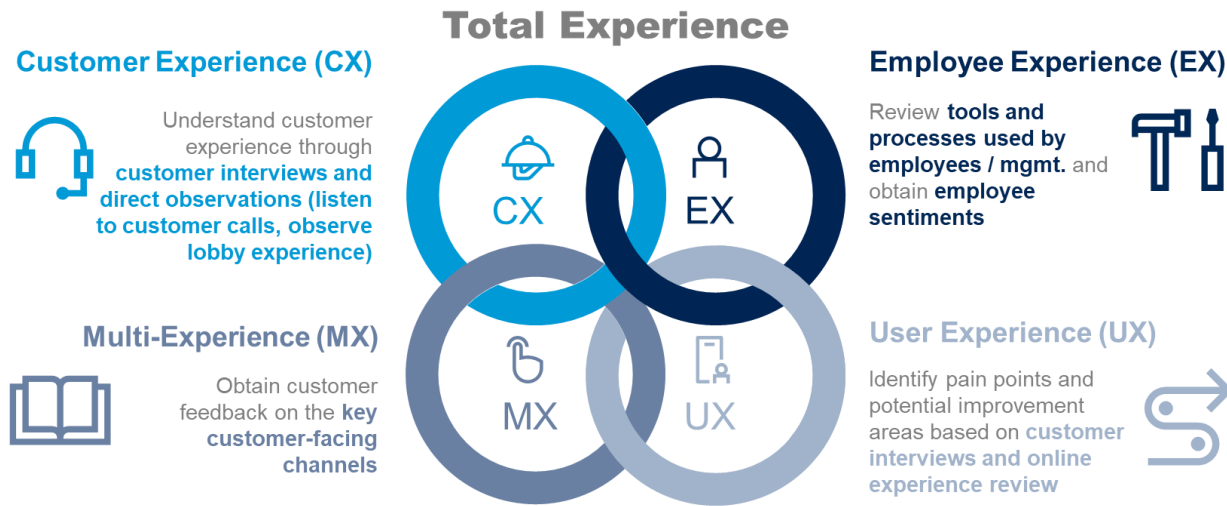
- Demonstrate value by linking to key performance indicators (KPIs) that prove how the contact center solution plays a critical role in improving a holistic customer experience as part of a larger business transformation initiative.



- Invest in automation enhancements such as chatbots, VCAs, speech recognition/transcription and NLP, complemented with APIs from partnerships or integrators.
- Improve multichannel customer interactions by tightly integrating with CRM systems.

Leveraging the insights and perspective from Gartner Research, available nowhere else, Gartner will bring unparalleled value to WA DOR and your strategic planning process.

In order to conduct a holistic review, the Gartner team leverages the Total Experience Framework to view the experience from multiple perspectives.

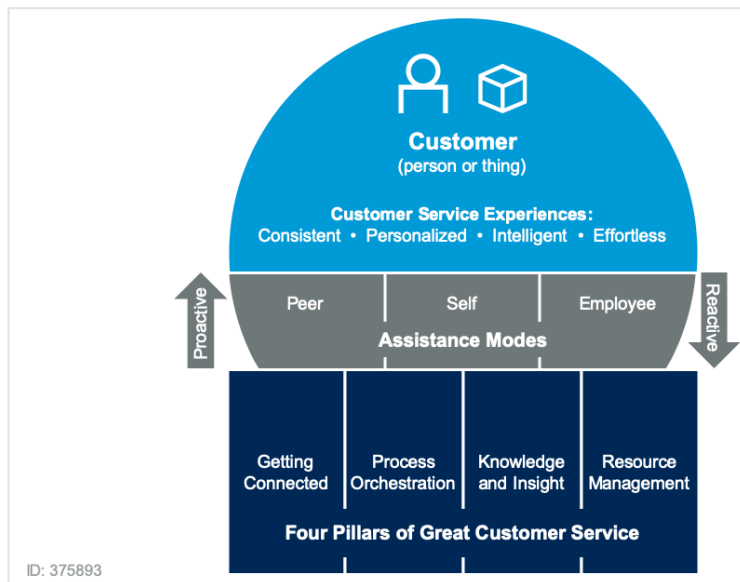


Our Customer Experience approach leans on four distinctive pillars, which together enables best practices within customer service.

Four Distinctive CX Pillars

- Getting Connected** — Primary focus is phone and IVR but includes chat, email, SMS, social
- Resource Management** — Workforce engagement tools, call recording
- Knowledge & Insight** — Speech analytics, customer journey, next best action, some knowledge management
- Process Orchestration** — Personalization of routing capabilities

Figure 19. Customer Service and Support Technology



12.3 Relevant Gartner Research Notes

Gartner Consulting extends Gartner Research to deliver actionable, objective insight to executives and their teams, throughout the engagement. Following is a small sample of recent Gartner research notes that are relevant to DOR's initiative.

Table 6. Relevant Research Notes Summary

Research Note Title	Analyst(s)	Date	Research ID
Critical Capabilities for Contact Center as a Service	Steve Blood, Pri Rathnayake, Drew Kraus, Pankil Sheth	23 August 2022	G00757260
How to Use Contact Centers to Drive Growth	Financial Services Business Leader Research Team	28 July 2022	G00767865
How to Negotiate Favorable Contact Center as a Service Contracts	Steve Blood	28 July 2022	G00765530
Market Opportunity Map: Unified Communications, Collaboration and Contact Center, Worldwide	Megan Fernandez	7 June 2022	G00764548
Forecast Analysis: Contact Center, Worldwide	Megan Fernandez, Daniel O'Connell	9 March 2022	G00764551

**Any questions regarding this Proposal
should be addressed to:**

Heide Cassidy
Senior Managing Partner
Gartner, Inc.
2001 Sixth Avenue, Suite 2200
Seattle, WA 98121
Telephone: +1 206 245 8321
Email: heide.cassidy@gartner.com

**This Proposal was prepared for
Washington State Department of Revenue:**

Heidi Whisman and Jennifer Macinata
Solicitation Coordinators
Washington State Department of Revenue
6500 Linderson Way SW
Tumwater, WA 98501
Telephone: +1 360 596 3782
Email: dorbidresponses@dor.wa.gov

Vendor Name: Gartner, Inc.

Instructions:

For each entry on the Issues List, describe in business terms, not in proposed Contract or legal language, the issue, concern, exception, or objection to the Draft Contract language. Include a description of the proposed solution and the reason/rationale. Statements such as “not acceptable” or supplying proposed Contract terms without describing (in business language) the reason/rationale is not the correct way to use this form.

Do not submit a redlined version of Contract or Contract sections.

Add more rows with the same formatting, if necessary.

If there are no issues with the Draft Contract language, state “No Issues” on the first row of this form. A response of “No Issues” will be taken to mean the Draft Contract is accepted as written. DOR reserves the right to negotiate any part of the Contract with the ASV.

Item	Reference Contract Section #	Issue	Vendor Proposed Solution and Reason/Rationale
Example	Section 26, Governing Law	Governing Law is the State of Washington	Vendor proposes using California law as the applicable state law. Rationale – California is the location of the Vendor’s headquarters.
1.	Section 7.5, Pricing	Requires Vendor to provide same terms as other governmental entities	Vendor proposes removing Section. Vendor’s pricing policy is that pricing is uniform across all State & Local Government clients. Discounts are not provided. Additionally, Vendor cannot provide most favored customer pricing to Purchaser as GSA is Vendor’s MFC.
2.	Section 18, Ownership/Rights in Data	Ownership rights include Work Product and does not include detail regarding Vendor’s ownership of pre-existing material	Vendor proposes modifying the Section to give ownership to the Deliverable, as described in the subsequent statement of work. Methodologies used in completion of the Deliverable are pre-existing material. Additionally, vendor proposes adding

			language detailing that Vendor retains right title, and interest to its processes, methodologies, etc.
3.	Section 22, Protection of Purchaser's Confidential Information	Confidentiality is not mutual	Vendor proposes modifying language to make the confidentiality section mutual. Vendor also requires confidentiality protection.
4.	Section 37.2, Review of Vendor's Records	Contains a provision that Vendor shall provide access to records within Thurston County	Vendor will comply with all reasonable records review requests but cannot commit to conducting the reviews in Thurston County.
5.	Section 38, Right of Inspection	Section is not applicable because it is geared toward manufacturing or systems integration services. Vendor is not providing these types of services.	Vendor proposes removing this clause entirely.
6.	Section 39, Patent and Copyright Indemnification	Section describes patent/copyright indemnification of Product or Work Product	Vendor proposes modifying the Section to provide patent and copyright indemnification for the Deliverable-consistent with the request to Section 18.
7.	Section 41, Insurance	Section 41.2(e) states that the professional liability insurance deductible should not exceed \$25,000.	Vendor proposes removing the deductible requirement or increasing it to \$2.5 million-which is Vendor's current deductible for Professional Liability coverage. Due to Vendor's size and annual revenue, it is only able to secure this coverage with this deductible.
8.	Section 53, Liquidated Damages	Liquidated damages are included in the Contract.	Vendor proposes removing this section. Liquidated damages are typically reserved for claims where damages or difficult or impossible to calculate, which would not be the case with this Contract.

9.	Section 55, Limitation of Liability	Section does not include a monetary limitation of liability.	Vendor proposes including a limitation of liability of fees paid by the Purchaser under the specific Statement of Work under which liability arises.
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