

Transmittal Letter

April 26, 2016

Todd Slatin
Purchasing Director
Lexington-Fayette Urban County Government
Room 338, Government Center
200 East Main Street
Lexington, KY 40507

Dear Mr. Slatin,

Solaritech, LLC dba The Solarity Group (hereinafter called "Solarity") appreciates the opportunity to present our qualifications for participating as a potential vendor for the Lexington-Fayette Urban County Government (hereinafter called "LFUCG") to provide Information Technology Consulting and Technical Services. Solarity is pleased to submit the following proposal in response to RFP #13-2016. We look forward to collaborating with a variety of stakeholders both within Information Technology Department and throughout LFUCG to successfully accomplish the desired outcomes for the duration of this contract.

Solarity has an excellent reputation for innovative program, portfolio, and project management; business analysis, strategic planning, engagement and change management; and operational management consulting throughout LFUCG the Commonwealth of Kentucky. Since 2003, our Kentucky-based organization has provided both consulting and training services for government agencies, institutions of higher education, and organizations of every size. We have enjoyed working with LFUCG and our clients in the government sector, which have a unique culture requiring innovative approaches honoring the relationships between staff, administration, and the constituent community. Based on our core competencies of project, program, and portfolio management, business analysis, change management, strategic planning, and IT service management, we will provide effective consulting, training, and expertise for LFUCG employees throughout the organization at the direction of the Information Technology Department.

We have read, understand and will comply with the guidelines put forth in this RFP and provide sworn statements of the following:

- i. In the response to this Solicitation, Solarity has no deviations from the requested scope of the contract.
- ii. If awarded a contract as a result of this Solicitation, Solarity shall comply in full with all requirements of the **Kentucky Civil Rights Act**, and shall submit **all data** required by KRS 45.560 to 45.640.
- iii. Pursuant to KRS 11A.040, Solarity has not knowingly violated any provisions of the **Executive Branch Code of Ethics**.
- iv. Solarity is in compliance with Prohibitions of Certain **Conflicts of Interest**.

- v. In accordance with Federal Acquisition Regulation 52.209-5, regarding **Debarment, Suspension, and Proposed Debarment**, to the best of Solarity's knowledge and belief, Solarity and/or its Principals or Subcontractors is (are) not presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any State or Federal agency.
- vi. **Contact Person** for this RFP:
 - Bud Ratliff**, President and Managing Partner
 - 961 Beasley St., STE 140
 - Lexington, KY 40509
 - toll free: 888-272-4494
 - office: 859-215-0253 ext. 101
 - fax: 859-212-6844
 - email: bud@solarity.com
- vii. **Contact Person** to serve as the point of contact for day-to-day operations:
 - Cory Camic**, Business Development Manager
 - 961 Beasley St., STE 140
 - Lexington, KY 40509
 - toll free: 888-272-4494
 - office: 859-215-0253 ext. 106
 - fax: 859-212-6844
 - email: cory@solarity.com

Our team would be grateful to provide references and/or further discuss these initiatives and demonstrate our capabilities during a vendor presentation. Please let me know if we can answer any questions or provide additional information in the meantime.

Best wishes,



Bud Ratliff
President and Managing Partner, Solarity

AFFIDAVIT

Comes the Affiant, Bud Ratliff, and after being first duly sworn, states under penalty of perjury as follows:

1. His/her name is Bud Ratliff and he/she is the individual submitting the proposal or is the authorized representative of Solarity, the entity submitting the proposal (hereinafter referred to as "Proposer").
2. Proposer will pay all taxes and fees, which are owed to the Lexington-Fayette Urban County Government at the time the proposal is submitted, prior to award of the contract and will maintain a "current" status in regard to those taxes and fees during the life of the contract.
3. Proposer will obtain a Lexington-Fayette Urban County Government business license, if applicable, prior to award of the contract.
4. Proposer has authorized the Division of Central Purchasing to verify the above-mentioned information with the Division of Revenue and to disclose to the Urban County Council that taxes and/or fees are delinquent or that a business license has not been obtained.
5. Proposer has not knowingly violated any provision of the campaign finance laws of the Commonwealth of Kentucky within the past five (5) years and the award of a contract to the Proposer will not violate any provision of the campaign finance laws of the Commonwealth.
6. Proposer has not knowingly violated any provision of Chapter 25 of the Lexington-Fayette Urban County Government Code of Ordinances, known as "Ethics Act."

Continued on next page

7. Proposer acknowledges that "knowingly" for purposes of this Affidavit means, with respect to conduct or to circumstances described by a statute or ordinance defining an offense, that a person is aware or should have been aware that his conduct is of that nature or that the circumstance exists.

Further, Affiant sayeth naught.

Bud Ratlibb
STATE OF KENTUCKY
COUNTY OF FAYETTE

The foregoing instrument was subscribed, sworn to and acknowledged before me by Bud Ratlibb on this the 25th day of April, 2016.

My Commission expires: 10/4/16

Sarah M. Sechrist
NOTARY PUBLIC, STATE AT LARGE



EQUAL OPPORTUNITY AGREEMENT

The Law

- Title VII of the Civil Rights Act of 1964 (amended 1972) states that it is unlawful for an employer to discriminate in employment because of race, color, religion, sex, age (40-70 years) or national origin.
- Executive Order No. 11246 on Nondiscrimination under Federal contract prohibits employment discrimination by contractor and sub-contractor doing business with the Federal Government or recipients of Federal funds. This order was later amended by Executive Order No. 11375 to prohibit discrimination on the basis of sex.
- Section 503 of the Rehabilitation Act of 1973 states:

The Contractor will not discriminate against any employee or applicant for employment because of physical or mental disability.

- Section 2012 of the Vietnam Era Veterans Readjustment Act of 1973 requires Affirmative Action on behalf of disabled veterans and veterans of the Vietnam Era by contractors having Federal contracts.
- Section 206(A) of Executive Order 12086, Consolidation of Contract Compliance Functions for Equal Employment Opportunity, states:

The Secretary of Labor may investigate the employment practices of any Government contractor or sub-contractor to determine whether or not the contractual provisions specified in Section 202 of this order have been violated.

The Lexington-Fayette Urban County Government practices Equal Opportunity in recruiting, hiring and promoting. It is the Government's intent to affirmatively provide employment opportunities for those individuals who have previously not been allowed to enter into the mainstream of society. Because of its importance to the local Government, this policy carries the full endorsement of the Mayor, Commissioners, Directors and all supervisory personnel. In following this commitment to Equal Employment Opportunity and because the Government is the benefactor of the Federal funds, it is both against the Urban County Government policy and illegal for the Government to let contracts to companies which knowingly or unknowingly practice discrimination in their employment practices. Violation of the above mentioned ordinances may cause a contract to be canceled and the contractors may be declared ineligible for future consideration.

Please sign this statement in the appropriate space acknowledging that you have read and understand the provisions contained herein. Return this document as part of your application packet.

Bidders

I/We agree to comply with the Civil Rights Laws listed above that govern employment rights of minorities, women, Vietnam veterans, handicapped and aged persons.


Signature


Name of Business

Affirmative Action Plan



EQUAL EMPLOYMENT OPPORTUNITY AND AFFIRMATIVE ACTION POLICY STATEMENT

It is the policy of Solaritech, LLC not to discriminate against any employee or any applicant for employment because of age, race, religion, color, handicap, sex, sexual orientation, physical condition, developmental disability, sexual orientation or national origin. This policy shall include, but not be limited to, the following: recruitment and employment, promotion, demotion, transfer, compensation, selection for training including apprenticeship, layoff and termination. Except with respect to sexual orientation, this company further agrees to take affirmative action to ensure equal employment opportunities.

Christy Adams has been appointed Equal Employment Opportunity Officer and is responsible for planning and implementing our affirmative action program as well as for its day-to-day monitoring of affirmative action related decisions and activities. All personnel who are responsible for hiring and promoting employees and for the development and implementation of programs or activities are charged to support this program. They shall provide leadership in implementing affirmative action goals and initiatives.

Christy Adams

Typed Name

DocuSigned by:
Christy Adams 01/01/2015
56801155DE8C4D1...
Signature Date

Partner/COO

Title

WORKFORCE ANALYSIS FORM

Name of Organization: Solarity

Categories	Total	White (Not Hispanic or Latino)		Hispanic or Latino		Black or African-American (Not Hispanic or Latino)		Native Hawaiian and Other Pacific Islander (Not Hispanic or Latino)		Asian (Not Hispanic or Latino)		American Indian or Alaskan Native (not Hispanic or Latino)		Two or more races (Not Hispanic or Latino)		Total	
		M	F	M	F	M	F	M	F	M	F	M	F	M	F	M	F
Administrators																	
Professionals		3	2														3 2
Superintendents																	
Supervisors																	
Foremen																	
Technicians																	
Protective Service																	
Para-Professionals																	
Office/Clerical			1														1
Skilled Craft																	
Service/Maintenance																	
Total:		3	3														3 3

Prepared by: Sarah Sechrist, Office Manager
 (Name and Title)

Date: 04 / 26 / 16
 Revised 2015-Dec-15



LFUCG MWDBE PARTICIPATION FORM
Bid/RFP/Quote Reference # 13-2016

The MWDBE subcontractors listed have agreed to participate on this Bid/RFP/Quote. If any substitution is made or the total value of the work is changed prior to or after the job is in progress, it is understood that those substitutions must be submitted to Central Purchasing for approval immediately.

MWDBE Company, Name, Address, Phone, Email	Work to be Performed	Total Dollar Value of the Work	% Value of Total Contract
1. Niward Management Co. 2333 Woodfield Circle Lexington, KY 40515 859-396-9568 niwardgroup@aol.com	Training Strategic Planning Project Management	\$50,000 - \$100,000 +	10% +
2.			
3.			
4.			

The undersigned company representative submits the above list of MWDBE firms to be used in accomplishing the work contained in this Bid/RFP/Quote. Any misrepresentation may result in the termination of the contract and/or be subject to applicable Federal and State laws concerning false statements and false claims.

Solaritech, LLC
Company

Bud Ratliff
Company Representative

4/26/2016
Date

President
Title

MWDBE Sub-contractor Information

Entity Information

DUNS: 782811652

Name: Niward Management Group, LLC

Doing Business As: Ward's Kentucky Specialties

Business Type: Business or Organization

POC Name: Nancy Ward

CAGE Number: 6R3L8

GENERAL PROVISIONS

1. Each Respondent shall comply with all Federal, State & Local regulations concerning this type of service or good.

The Respondent agrees to comply with all statutes, rules, and regulations governing safe and healthful working conditions, including the Occupational Health and Safety Act of 1970, *29 U.S.C. 650 et. seq.*, as amended, and KRS Chapter 338. The Respondent also agrees to notify the LFUCG in writing immediately upon detection of any unsafe and/or unhealthful working conditions at the job site. The Respondent agrees to indemnify, defend and hold the LFUCG harmless from all penalties, fines or other expenses arising out of the alleged violation of said laws.

2. Failure to submit ALL forms and information required in this RFP may be grounds for disqualification.
3. Addenda: All addenda, if any, shall be considered in making the proposal, and such addenda shall be made a part of this RFP. Before submitting a proposal, it is incumbent upon each proposer to be informed as to whether any addenda have been issued, and the failure to cover in the bid any such addenda may result in disqualification of that proposal.
4. Proposal Reservations: LFUCG reserves the right to reject any or all proposals, to award in whole or part, and to waive minor immaterial defects in proposals. LFUCG may consider any alternative proposal that meets its basic needs.
5. Liability: LFUCG is not responsible for any cost incurred by a Respondent in the preparation of proposals.
6. Changes/Alterations: Respondent may change or withdraw a proposal at any time prior to the opening; however, no oral modifications will be allowed. Only letters, or other formal written requests for modifications or corrections of a previously submitted proposal which is addressed in the same manner as the proposal, and received by LFUCG prior to the scheduled closing time for receipt of proposals, will be accepted. The proposal, when opened, will then be corrected in accordance with such written request(s), provided that the written request is contained in a sealed envelope which is plainly marked "modifications of proposal".
7. Clarification of Submittal: LFUCG reserves the right to obtain clarification of any point in a bid or to obtain additional information from a Respondent.
8. Bribery Clause: By his/her signature on the bid, Respondent certifies that no employee of his/hers, any affiliate or Subcontractor, has bribed or

attempted to bribe an officer or employee of the LFUCG.

9. **Additional Information:** While not necessary, the Respondent may include any product brochures, software documentation, sample reports, or other documentation that may assist LFUCG in better understanding and evaluating the Respondent's response. Additional documentation shall not serve as a substitute for other documentation which is required by this RFP to be submitted with the proposal,
10. **Ambiguity, Conflict or other Errors in RFP:** If a Respondent discovers any ambiguity, conflict, discrepancy, omission or other error in the RFP, it shall immediately notify LFUCG of such error in writing and request modification or clarification of the document if allowable by the LFUCG.
11. **Agreement to Bid Terms:** In submitting this proposal, the Respondent agrees that it has carefully examined the specifications and all provisions relating to the work to be done attached hereto and made part of this proposal. By acceptance of a Contract under this RFP, proposer states that it understands the meaning, intent and requirements of the RFP and agrees to the same. The successful Respondent shall warrant that it is familiar with and understands all provisions herein and shall warrant that it can comply with them. No additional compensation to Respondent shall be authorized for services or expenses reasonably covered under these provisions that the proposer omits from its Proposal.
12. **Cancellation:** If the services to be performed hereunder by the Respondent are not performed in an acceptable manner to the LFUCG, the LFUCG may cancel this contract for cause by providing written notice to the proposer, giving at least thirty (30) days notice of the proposed cancellation and the reasons for same. During that time period, the proposer may seek to bring the performance of services hereunder to a level that is acceptable to the LFUCG, and the LFUCG may rescind the cancellation if such action is in its best interest.

A. Termination for Cause

- (1) LFUCG may terminate a contract because of the contractor's failure to perform its contractual duties
- (2) If a contractor is determined to be in default, LFUCG shall notify the contractor of the determination in writing, and may include a specified date by which the contractor shall cure the identified deficiencies. LFUCG may proceed with termination if the contractor fails to cure the deficiencies within the specified time.


- (3) A default in performance by a contractor for which a contract may be terminated shall include, but shall not necessarily be limited to:
 - (a) Failure to perform the contract according to its terms, conditions and specifications;
 - (b) Failure to make delivery within the time specified or according to a delivery schedule fixed by the contract;
 - (c) Late payment or nonpayment of bills for labor, materials, supplies, or equipment furnished in connection with a contract for construction services as evidenced by mechanics' liens filed pursuant to the provisions of KRS Chapter 376, or letters of indebtedness received from creditors by the purchasing agency;
 - (d) Failure to diligently advance the work under a contract for construction services;
 - (e) The filing of a bankruptcy petition by or against the contractor; or
 - (f) Actions that endanger the health, safety or welfare of the LFUCG or its citizens.

B. At Will Termination

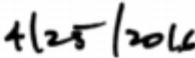
Notwithstanding the above provisions, the LFUCG may terminate this contract at will in accordance with the law upon providing thirty (30) days written notice of that intent, Payment for services or goods received prior to termination shall be made by the LFUCG provided these goods or services were provided in a manner acceptable to the LFUCG. Payment for those goods and services shall not be unreasonably withheld.

13. **Assignment of Contract:** The contractor shall not assign or subcontract any portion of the Contract without the express written consent of LFUCG. Any purported assignment or subcontract in violation hereof shall be void. It is expressly acknowledged that LFUCG shall never be required or obligated to consent to any request for assignment or subcontract; and further that such refusal to consent can be for any or no reason, fully within the sole discretion of LFUCG.
14. **No Waiver:** No failure or delay by LFUCG in exercising any right, remedy, power or privilege hereunder, nor any single or partial exercise thereof, nor the exercise of any other right, remedy, power or privilege shall operate as a waiver hereof or thereof. No failure or delay by LFUCG in exercising any right, remedy, power or privilege under or in respect of this Contract shall affect the rights, remedies, powers or privileges of LFUCG hereunder or shall operate as a waiver thereof.

15. **Authority to do Business:** The Respondent must be a duly organized and authorized to do business under the laws of Kentucky. Respondent must be in good standing and have full legal capacity to provide the services specified under this Contract. The Respondent must have all necessary right and lawful authority to enter into this Contract for the full term hereof and that proper corporate or other action has been duly taken authorizing the Respondent to enter into this Contract. The Respondent will provide LFUCG with a copy of a corporate resolution authorizing this action and a letter from an attorney confirming that the proposer is authorized to do business in the State of Kentucky if requested. All proposals must be signed by a duly authorized officer, agent or employee of the Respondent.
16. **Governing Law:** This Contract shall be governed by and construed in accordance with the laws of the Commonwealth of Kentucky. In the event of any proceedings regarding this Contract, the Parties agree that the venue shall be the Fayette County Circuit Court or the U.S. District Court for the Eastern District of Kentucky, Lexington Division. All parties expressly consent to personal jurisdiction and venue in such Court for the limited and sole purpose of proceedings relating to this Contract or any rights or obligations arising thereunder. Service of process may be accomplished by following the procedures prescribed by law.
17. **Ability to Meet Obligations:** Respondent affirmatively states that there are no actions, suits or proceedings of any kind pending against Respondent or, to the knowledge of the Respondent, threatened against the Respondent before or by any court, governmental body or agency or other tribunal or authority which would, if adversely determined, have a materially adverse effect on the authority or ability of Respondent to perform its obligations under this Contract, or which question the legality, validity or enforceability hereof or thereof.
18. Contractor understands and agrees that its employees, agents, or subcontractors are not employees of LFUCG for any purpose whatsoever. Contractor is an independent contractor at all times during the performance of the services specified.
19. If any term or provision of this Contract shall be found to be illegal or unenforceable, the remainder of the contract shall remain in full force and such term or provision shall be deemed stricken.



Signature



Date



SOLAGRO-01 TMILLER

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
4/26/2016

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Lexington / AssuredPartners NL 2416 Sir Barton Way, Suite 300 Lexington, KY 40509		CONTACT NAME: PHONE (A/C, No, Ext): (859) 543-1716 FAX (A/C, No): (859) 543-1987 E-MAIL ADDRESS:	
		INSURER(S) AFFORDING COVERAGE INSURER A : Selective Insurance of South Carolina	NAIC # 19259
INSURED Solaritech, LLC 1500 Bull Lea Rd, Ste 211 Lexington, KY 40511		INSURER B : INSURER C : INSURER D : INSURER E : INSURER F :	

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL/SUBR INSD WYD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GENL AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:	X	S 2174507	08/03/2015	08/03/2016	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 3,000,000 PRODUCTS - COMPVOP AGG \$ 3,000,000
A	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS		S 2174507	08/03/2015	08/03/2016	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$ 0	X	S 2174507	08/03/2015	08/03/2016	EACH OCCURRENCE \$ 1,000,000 AGGREGATE \$ 1,000,000
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A			PER STATUTE OTHER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER LFUCG 200 E. Main St. Lexington, KY 40507	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE
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SOLALLC-01 TMILLER

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
4/27/2016

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Lexington(BMI) / AssuredPartners NL 2416 Sir Barton Way, Suite 300 Lexington, KY 40509	CONTACT NAME: PHONE (A/C, No, Ext): (859) 543-1716 FAX (A/C, No): (859) 543-1987 E-MAIL ADDRESS:	
	INSURER(S) AFFORDING COVERAGE INSURER A : Mount Vernon Fire Insurance Company	NAIC # 26522
INSURED Solaritech LLC 961 Beasley St. Ste 140 Lexington, KY 40509	INSURER B :	
	INSURER C :	
	INSURER D :	
	INSURER E :	
	INSURER F :	

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

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INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSD	WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMPVOP AGG \$ \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A				<input type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	Professional Liab			SP2551336	04/23/2016	04/23/2017	1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

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Company Information

1. Company name and address

Solaritech, LLC (Solarity) is a professional change, project, program, and portfolio management and business consulting services firm based in Lexington, KY. Solarity provides certified, experienced change, project, and program managers and business consultants to assist state agencies and businesses with specific efforts to enable them to focus their resources on *what they do best*. Solarity also provides business consulting in strategic planning and business analysis. Solarity is a Registered Education Provider (R.E.P.) for the Project Management Institute (PMI) and a Microsoft Partner specializing in Enterprise Project Management (EPM) using Microsoft Project and Microsoft Project Server.

Company Name

Solaritech, LLC (dba: The Solarity Group)

Address

961 Beasley St., Suite 140
Lexington, KY 40509

2. Identify all business partners you have with technology and consulting firms

Solarity partners with a select number of business partners in order to provide the best level of service to our clients through specific skill sets. We are on a mission to “partner with people and organizations to advance their strategic goals by defining the right work, planning that work, and working the plan,” adjusting as necessary until we achieve success.

Our primary business focus is to assist organizations with strategic changes that require the synchronization of people, processes, platforms, and content. We do this using the disciplines of engagement, change management, coaching, project management, and business analysis.

Our business partners and subcontractors include:

- NIWARD Management Group, LLC (Nancy Ward)
- Barnes PM Consulting, LLC (Terry Barnes)
- B2T Training
- EPM Strategy
- Composable Systems

3. Provide resumes for all individuals being submitted for work under this RFP

Resource Information

Solarity Resources Submitted for Work Under RFP #13-2016				
Name	Location	Hourly Rate*	Travel Expenses**	Employment Status
Bud Ratliff	Lexington, KY	\$156	N/A	Employee
Christy Adams	Lexington, KY	\$156	N/A	Employee
Nancy Ward	Lexington, KY	\$178	N/A	Sub-contractor
Terry Barnes	Lexington, KY	\$156	N/A	Sub-contractor
Bert Walther	Lexington, KY	\$156	N/A	Employee
Sue Knies	Lexington, KY	\$156	N/A	Employee
Sharon Marcum	Lexington, KY	\$156	N/A	Sub-contractor
Cory Camic	Lexington, KY	\$156	N/A	Employee
Collin Quiring	Siloam Springs, AR	\$225	Pass-through	Sub-contractor
Composable Systems	Louisville, KY	\$175	Pass-through	Sub-contractor

*Hourly rate may be adjusted based on type and duration of work required. Certain rates may adjust based on certifications obtained. Please see service rates for more details.

**Travel expenses are not applicable for any work performed by resources with their home based within 35 miles of Fayette County. Travel expenses may apply for work performed outside of Fayette County. To review travel expense rates for work performed outside of Fayette County, please see the Cost of Services section.

Additional resources may be submitted for work under this RFP, pending specialized skill requirements.

Resumes

The following pages contain the resumes of key resources mentioned in this proposal, and other representative resources who may be able to contribute work under this RFP.



Bud Ratliff

PMP®, MCTS, Microsoft Project MVP 2007-2009

Cell: 859-539-9161 • Office: 859-215-0253

Bud.Ratliff@solarity.com

Summary

I serve and support our amazing team and partners. Together, we help our valued customers generate, understand, and achieve their strategic goals in ways that fit the size of the initiative and the culture of the organization.

We employ the practices, tools, and techniques of education, technology, enterprise project management, change management, business analysis, and organizational development in the service of our customers' needs.

On my best day, I work with people, actively caring about who they are and what they do. Generating innovative ideas and grounding them in reality, I help our customers and partners advance the things that matter most. On my best day, I'm helping to build my community, sharing time with my family, and meeting people where they are. Every day at Solarity is my best day.

Experience

Principal, The Solarity Group

2003 - Present

- Significant work as a program and project manager for many programs and projects, large and small, in technology, manufacturing, beverage, and education verticals.
- Account manager and lead consultant in the development and execution of an integrated engagement, change management, and project management methodology, which included use of Microsoft Project Server.
- Development and delivery of customized project management, change management, and related technology courses, focused on measurable outcomes for customers.
- Implementation, configuration, and management of Microsoft Project Server (2003-2013).
- Author of several books and articles related to Microsoft technology.
- Guided the growth and operations of the company, responsible for P&L, and hiring and firing of employees and contractors.

Regional Manager, Koinonia Computing

1996 - 2003

- Managed and oversaw the staff of the Lexington region, and was the primary consultant and contact for IT services at Toyota Motor Manufacturing for our company.
- At Toyota, I led several multi-million dollar projects responsible for delivering services across Toyota's North American manufacturing operations.

Education



Asbury University, Wilmore, Kentucky – Bachelor of English Secondary Education, minor Psychology



University of Kentucky, Lexington, Kentucky – Postgraduate studies, English Literature

Certifications and Honors

PMP (Project Management Professional) since 2001

IT Project+ (CompTIA)

MCTS (Microsoft Certified Technical Specialist) on Microsoft Project/Project Server

MCT (Microsoft Certified Trainer)

MCSE (Microsoft Certified Systems Engineer)

Prosci® Change Management and Advanced Change Management certifications

MVP - Selected as Most Valuable Professional by Microsoft on Microsoft Project from 2007-2009; Selected as Most Valuable Professional by Microsoft on ISA Server from 2004-2007

Selected as "Distinguished Leader" by the Leadership Lexington Class of 2003-2004

Associations

President, Project Management Institute (PMI) Kentucky Bluegrass Chapter
(www.pmibluegrass.org)

Founder, Lexington Microsoft Users Group

Steering Committee IAMCP

Served in many other leadership positions in PMI, Toastmasters, and local community groups



Christy LW Adams

PMP®

Office: 859-215-0253 • christy@solarity.com

Skills

Excellent active-listening and communicating skills, trainer and motivator, highly articulate, motivated to demonstrate success to stakeholders, prioritizes customer satisfaction, streamlined in organization, work processes and management reporting, appreciation and focus on overall company objectives in handling external and internal tasks and challenges, encourage and practice effective teamwork, constantly strive to improve efficiency and effectiveness in all areas.

Experience

The Solarity Group

Partner and COO

May 2012 - Present

- Responsible for successful day to day operations, management of staff and subcontractors, and development and implementation of business and HR processes and procedures
- Plan and implement growth strategies and business development
- Coordination and presentation of all classes and training sessions offered by Solarity including PMP Exam Preparation classes

Hensley, Elam & Associates

Partner

January 2009 to July 2012

- Building and improving Project Management processes throughout the company
- Ongoing Professional Services Manager responsibilities
- Ongoing Project Manager responsibilities

Professional Services Manager

October 2007 - July 2012

- Ensured successful, profitable projects
- Recommended hiring and releasing staff and contractors
- Managed professional staff and contractors, and coached employees to improve in their positions throughout their time with HEA and to manage client expectations
- Reported program and project progress as required to clients and partners.
- Managed company project processes and improvements
- Preparation of project documentation, contracts, responses to RFPs and other documentation
- Managed current agreements in place between HEA and its clients
- Account Management
- Developed new business opportunities from existing clients
- Employee and client training
- Participated in sales meetings and partner conferences
- Used company CRM (ConnectWise) and other systems to manage staff and client data and projects
- Promoted company through marketing campaigns and national conference participation

Project Manager

June 2002 - July 2012

- Sole project manager while company demonstrated 20% growth rate each year
- Successfully managed the development and implementation of multiple software projects for clients including Toyota Tsusho, S&S Tire, ATA Airlines, University of Kentucky, and others
- Directly contributed to the growth and success of company through proven selling, development and implementation of software applications for desktops, laptops, websites and handhelds

University of Kentucky

Administrative Director, General Clinical Research Center

1998 - 2002

- Prepared, coordinated, successfully executed rigorous, nationally competitive renewal submission for awarded NCRR/NIH \$12 million grant
- Ability to demonstrate building successful relationships across multiple and diverse University Departments, Research Centers, and Community Organizations at the University including hospital accounting, research labs, clinic business offices, UK research foundation

- Ability to work with and communicate with doctors, administrators, researchers and federal grants officers

Office Manager, Division of Infectious Diseases Business Office
1996 - 1998

Office Manager, Blood and Marrow Transplant Business Office
1994 - 1996

Executive Administrative Assistant / Office Manager, Center for Prevention Research
1991 - 1994

Education

BS, Decision Science and Information Systems, University of Kentucky

Certifications and Honors

PMP® Certification

Appreciative Inquiry Certification

PMI member

Associations

Godly Play Teacher – Christ Church Cathedral

Member of the Council of Supply Chain Management Professionals

Member of the Professional Women’s Forum - Lexington Chapter

Treasurer (2011-2012)/President (2012-2013) – Tates Creek Middle School PTSA

Member of PMI Bluegrass Chapter since 2008-currently VP of Programs



Nancy Ward
PMP®, MBA

Office: 859-396-9568 • nancy@solarity.com

Summary

Executive with extensive experience in strategic consulting, program design and management, project management and change management for government, higher education, and non-profit sectors specializing in setting and implementing strategic directions to achieve intended benefits.

Experience

The Solarity Group

Strategic Consultant

2001 - Present

Performed strategic planning/setting and consultancy, program design, planning and implementation services for a cross section of organizations: government (state & local), libraries, non-profits and higher education.

Developed, applied and continuously improve an integrated services delivery framework for successful strategy planning and implementation to include strategic engagement, change management and program/project management best practices. Also provided supportive services to include business assessment/analysis, program/policy analysis, governance development and client relationship management.

Commonwealth of Kentucky

Deputy Project Manager / Executive Assistant to KY Governor

1997 to 2001

Leadership, management and direction for the Commonwealth's EMPOWER Kentucky, a major re-engineering enterprise-wide project.

Executive staff to all central functions for EMPOWER.

Facilitated the integration of information technologies across projects, advised on the change management/ training curricula, designed the public-private partnership contracts for procuring IT services.

Maintained central coordination of all aspects of EMPOWER KY projects to include legislative analysis, review and development and operations, such as event management, customer relationship management, contract management, as well as compiling recommendations for efficient administration and transition of EMPOWER KY as a sustained best practice in the Commonwealth.

KY Revenue Cabinet

Chief Information Officer / Commissioner

1996 - 1997

Strategic leadership and oversight management for information technology and security in the Kentucky Revenue Cabinet, the Commonwealth's tax administration agency. Included the following:

- Strategic planning and architectural guidance for IT integration with Cabinet's business strategic plan.
- Oversight management of sixty Cabinet staff and 30 contractors responsible for operating over 30 mainframe and personal computing systems, network services and maintenance of support services to approximately 1,000 users.
- Planning, consultation, policy development and project management/coordination for implementation of e-government throughout Executive Branch.
- Budget, business planning, procurement, disaster recovery planning to include Cabinet Y2K oversight and management.
- External representation for statewide IT planning & architecture, management & e-government.

Commissioner, Department Administrative Services

1995 – 1996

Oversight management of three major divisions and 350 full time staff providing administrative support, including information technology, budget and fiscal oversight, property management services, personnel, training/development, & tax-processing center.

KY Information Resources Management Commission

Deputy Executive Director

1994 – 1995

Executive staff to the Commission, formed by the legislature to provide management and direction to all statewide public sector information and communications initiatives. Included establishment of strategic IT planning process for all executive branch agencies and the

Commonwealth; research and analysis, policy development of IT management issues and strategic initiatives implementation.

Education



Xavier University, Cincinnati, Ohio – Masters of Business Administration



University of Kentucky, Lexington, Kentucky - Bachelors of Arts, Political Science

Achievements

Strategic Consultancy

Kentucky Community & Technical College System (2012 – 2015)

- Strategic Portfolio and Project Management
- Organizational Change Integrated Framework & Implementation
- Organizational Change Integrated Training Curricula and Course Development

Commonwealth of Kentucky, Finance and Administration Cabinet

- Kentucky Enterprise Learning Management System (KELMS) (2014 -2015)
- Governance development
- Program Management
- Commonwealth Office of Technology Strategic Plan (2014)

Kentucky Virtual Library

- Strategic Plan (2009)
- Strategic Plan and Operational Analysis (2013)

Woodford County Library Strategic Plan (2012)

Anderson (County) Public Library Strategic Plan (2012)

Laurel County Library Strategic Plan (2010)

Wilderness Road Council of the Girl Scouts Strategic Plan (2008)

Brown Forman Internal Project Management Certification Program & training (2007 – 2008)

United Way of the Bluegrass 211 Implementation (2004 - 2005)

Process Improvement

Operations Coordinator for EMPOWER KY, KY's state government comprehensive re-engineering and change management initiative for service and operations improvement resulting return \$550+ million from \$170+ million investment.

Project/Program Management

Deputy Project Manager for EMPOWER KY portfolio of projects. Oversight portfolio management and “public presence” relations for EMPOWER KY. Certified Project Management Professional (PMP) by Project Management Institute - 2001. Co-developed public sector project management & leadership curriculum.

Information Technology

Implementer and integrator of KY’s management strategies for IT and EMPOWER KY. Architect of the public private partnership - KY’s Strategic Alliances Services Contracts with 15 IT vendors. 1st CIO of KY Revenue Cabinet. Promotor/implementer of e-government. Technical advisor to KY’s IT Governance Team and IT Architecture and Standards Committee. Principal author of KY’s 1st CIO legislation. Award winning information system designer for: On-line Certification & Voucher Issuance for the Women, Infants & Children Program (U.S.D.A. award) & KY’s Information Technology Strategic Planning System (NASIRE/NASCIO award).

Strategic Planning

Development Team member for KY’s Strategic Information Technology Plan. Project manager for KY’s Strategic Planning design and implementation for all Executive Branch agencies. Oversaw strategic planning process for information technology for the Commonwealth.

Financial Management and Budgeting

Overseer of the biennial budget development and monitoring for the Kentucky Revenue Cabinet (approximately \$60 million/year budget). Established a total cost of ownership model system for EMPOWER KY projects.

Certifications

Project Management Professional (PMI)

Prosci Change Management Certification

Associations

Project Management Institute (PMI)
Member

PMI Bluegrass Chapter Member

International Institute of Business Analysis
(IIBA) Member

Bluegrass Chapter IIBA Member

Commerce Lexington

University of Kentucky Alumni Association

Kentucky Colonels



Terry S. Barnes

PMP®, MBA

Cell: 859-361-0435 • Office: 859-215-0253
Terry.barnes@solarity.com

Summary

Excels in providing Program or Project Management services that require an advanced understanding of project management and process management. Able to strategically utilize project management process to successfully plan and execute projects.

- Experience as a professional business operations manager and IT infrastructure/application development project manager.
- Goal oriented with strong leadership skills.
- Mentor and role model.
- Excellent communication, interpersonal and organizational skills.
- Experience in operations/service management, engineering, sales, and financial/cost accounting.
- Application software skills include MS Word, Excel, Power Point, Visio, Project and SharePoint.
- Experience using SharePoint 2007, 2013 and Office 365
- Experience using MS Project and MS Visio 2013
- Education Summary:
- Masters Business Administration/ Duke University
- Project Management Professional (PMP)/Project Management Institute (PMI) Certified
- Masters Certificate in IT Project Management ESI/George Washington University.
- Certification in Change Management Prosci and the Change Management Learning Center

Detailed Work Experience

3/2014 – PRESENT BARNES PM CONSULTING LLC LEXINGTON, KY

Project Management Consulting Subcontracted to The Solarity Group

- Project management consultant for two legacy application software replacement projects.
- Project management consulting for an Active Directory upgrade project.

9/2013 – 2/2014 BARNES PM CONSULTING LLC LEXINGTON, KY

Project Management Consulting

- Business-to-business contract with Solutia Consulting sub-contracted to 3M Corporation

- On-site project manager to Kentucky Transportation Cabinet

2008 – 2013

KEANE, INC (NTT DATA)

FRANKFORT, KY

Program Manager

- Modernization project to replace statewide vehicle titling and registration system.
- \$25,000,000 capital budget
- Software vendor contract management
- Imaging solution design, test, and build
- Design and build legacy system data warehouse
- Cleansing and conversion of legacy data
- Modernization of statewide infrastructure
- Training and organizational change management
- Stakeholder management of executive, legislative, and county officials

7/2006 - 2008

KEANE, INC.

FRANKFORT, KY

Project Manager

- Project Manager for Commonwealth for Kentucky mainframe legacy systems and distributed systems
- Managed multiple projects in parallel
- Managed project budgets from \$50,000 - \$2,000,000
- Managed legislatively mandated schedules

10/2005 – 7/2006

ACS, INC.

LEXINGTON, KY

Best Practice Project Manager – PMO

- Project leader for developing and implementing best practice software engineering standards
- Provided company specific lifecycle, requirements and security training for project teams
- Implemented PMO IT and physical security processes
- Provided project management governance for four project teams
- Developed and maintained project management policies and procedures

08/2005 – 12/2005

KCTCS

LEXINGTON, KY

Adjunct Instructor – Introduction to Business

- Taught introduction to business class

01/2004 – 07/2005

KEANE, INC.

FRANKFORT, KY

Consultant – Operations Manager, Kentucky Department of Education

- Mentor for IT engineering staff
- Developed and implemented processes for management of enterprise level network to serve secondary education
- Project manager for an enterprise anti-virus policy deployment

- Project manager for WAN/LAN redesign projects
- Responsible for maintaining enterprise services – Active Directory, Messaging, Security, Data Center Services and Network Infrastructure

05/03 – 10/03 VERIZON ENTERPRISE SOLUTIONS KY

Corporate Account Manager

- Developed business relationships with existing/former Commonwealth of Kentucky and Verizon Enterprise customers
- Account manager for a Hospital Corporation's enterprise for voice network

2000 – 2003 ATI, INC. FRANKFORT, KY

General Manager

- Responsible for the start-up, development, and implementation of the business plan for IT/telecom division
- Developed and implemented the division marketing/sales plan
- Developed and implemented division operational and maintenance procedures
- Responsible for P&L results

1999 – 2000 BELLSOUTH BUSINESS SYSTEMS LOUISVILLE, KY

Regional Program Manager

- Served as mentor/trainer for Sales Division project management staff
- Project management consultant for a 300 drop, multi-state WAN network project

1996 – 1999 GTE OF THE SOUTH LEXINGTON, KY

Area Manager – Customer Operations

- Managed the provisioning and repair of telephone services for 250,000 customers
- Responsible for meeting Public Service Commission quality of service standards and company budget objectives
- Change management responsibility for helping employees transition from a monopoly market to a competitive market environment.

1994 – 1996 GTE OF THE SOUTH DURHAM, NC

Manager – Project Management

- Managed a staff of project managers responsible for implementing major capital projects (\$1M - \$10M) and the rollout of advanced telecommunications products and services across a four state area.
- Responsible for implementing PMI project management practices and procedures in a multi-functional operations organization.

1990 – 1994 GTE OF THE SOUTH LEXINGTON, KY

Operations Manager – Operations Center

- Program manager for \$25M central office/outside plant capital construction budget.

- Program manager for three successful digital central office conversions.
- Project manager for successful implementation of national digital signaling system (SS7) re-home.

OTHER POSITIONS:

- Manager – Central Office Switching Services
- Supervising Engineer – Electronic Hardware
- Switching Systems Engineer
- Switching Systems Maintenance Supervisor
- Part time retail sales

Education

- 2004 - 2007 ESI (George Washington University) Masters Certificate IT Project Management
- 1985 – 1988 Duke University, Durham, NC, MBA
- 1970 – 1974 Eastern Kentucky University, Richmond, KY
- BS Industrial Technology (Electronics), AA Broadcast Engineering Technology

Additional Education

- Prosci Change Management Training and Certification - 2014
- Parametric estimation using Cost Xpert software tool – 2006
- Microsoft Project 2003 – 2006
- Keane Productivity Management – 2004
- Total Project Control – 2001
- BellSouth Network Data Services – 1999 / 2000
- Project Planning and Implementation – 1996
- Advanced Project Management – 1994
- Microsoft Project 98 – 1999

Accreditations

- Prosci Change Management Processes Certification - 2014
- Project Management Professional (PMP) – Project Management Institute – 1996 to Present
- Certificate of Project Management – University of California Extension, Santa Cruz – 1994

Professional Memberships

- Project Management Institute – 1994 to Present
- Kentucky Bluegrass Chapter of PMI – 1996 to Present (2008 President Elect)
- BiCSi – 2000-2002

Bert Walther

Office: 859-215-0253 • bert.walther@solarity.com

Summary

During his career, Bert has had the privilege of working with many highly qualified people in the Central Kentucky business community. With their help he has gained over 20 years of technology and operations experience, including over 10 years of project management expertise. In his various roles and responsibilities, he has fostered organizational development through effective program and personnel management, and worked hard to deliver project and initiatives as designed and anticipated.

He has experience planning, developing, and implementing technology solutions in mid-size environments, utilizing resources, and managing staff. He is adept at crisis management, troubleshooting, problem solving, and systems administration. He also has experience:

- Fostering organizational development through effective change management by preparing for, managing and reinforcing the change
- Analyzing needs, goals, and constraints while managing quality, risk, human resources, and deliverables
- Promoting and providing the education, communication and leadership necessary to achieve "buy-in" by all major stake holders in order to accomplish needed business process re-engineering
- Employing the proper program and project management tools and team supervision in order to realize the targeted results while insuring the achievement of "Best Practices" within an organization

Experience

The Solarity Group

Project Manager

January 2016 – Present

Bert join the Solarity team in January and is currently managing projects with two Central Kentucky organizations.

Asbury University

Help Desk Manager

For more than 10 years Bert's primary responsibility was to provide program, project, and personnel management as the Help Desk Manager at Asbury University. During this time, he set the overall direction, policies, standards, and guidelines for the support ecology emphasizing standardization and security. Other responsibilities included:

- Annual institutional technology purchasing
- Budget control emphasizing cost reduction while improving and expanding services
- Business process analysis and improvement
- Development of staff through training, mentoring, team building, communication, and documentation
- Management of annual projects of upgrading hardware and software for 12 instructional computer labs
- Project Management for upgrading, integrating, and replacing institutional systems
- Administration of Help Desk servers and systems

Manpower Professional

Technical Recruiter

For five years Bert worked as a technical recruiter managing the full life-cycle of the recruiting/sourcing and hiring process for many Central Kentucky companies. During his last year at Manpower, he was promoted to Operational Supervisor and worked closely with Regional Manager to clearly define role and performance expectations and cultivate corporate relationships. As a part of this time he also assisted with technical recruiting for the Dayton, Ohio Franchise Office.

Education

Asbury University, Wilmore, Kentucky – Bachelor of Arts

Associations

- EDUCAUSE
- Consortium of Christian Colleges & Universities
- Association of Independent Kentucky Colleges & Universities
- Lay Diocesan Council Member for the Diocese of the South, Orthodox Church in America
- Founder of the Lexington Professional Linux Users Group



Sue Knies

PMP®, **CSSBB**

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sue.knies@solarity.com

Summary

Results-oriented **Executive Project Manager**, **PMI Project Management Professional (PMP)** and **Certified Six Sigma Black Belt (CSSBB)** with expertise in all phases of the project life cycle from initiating and planning through executing, monitoring and controlling, to closing. Consistently deliver solutions that exceed client expectations. Strong skills in team leadership, communication, business acumen, quality programs, application and process development, systems integration, facilitation, and business process / systems analysis. Organized, self-motivated, energetic, efficient and dedicated.

Experience

The Solarity Group

The Solarity Group provides Project Management Training and Consulting Services for all industries, from health care to manufacturing to information technology. Our goal is to work to understand our customers' business needs, and then deliver the right service to them.

Executive Project Manager and Instructor

2013 - Present

As an Executive Project Manager and PMI Project Management Professional (PMP), I perform quality project management for our clients, while consulting and advising based on my extensive experience. My primary focus is understanding and meeting customer needs. Like all at Solarity, I am committed to continuous improvement and personal professional development.

As an Instructor, I teach and mentor students in project management, helping to translate best practices and PMI principles into concepts and approached that students can readily understand and utilize. I practically illustrate key concepts, based on theory, my experience, and connecting to the experience of the student.

As a Certified Six Sigma Black Belt (CSSBB), I work with our clients to improve the quality of their business processes by methodically identifying and minimizing causes of defects and promoting positive, stable, and predictable results.

International Business Machines (IBM) Corporation

IBM is a multinational technology and consulting corporation that manufactures and markets computer hardware and software, and offers infrastructure, hosting and consulting services in areas ranging from mainframe computers to nanotechnology. I managed projects in multiple IBM divisions and organizations including Global Services, Corporate Headquarters, and Systems and Technology Group.

Executive Project Manager

2007 - 2013

- Performed as Worldwide Client Project Management (CPM) owner in the Systems and Technology Group. CPM is an ongoing process supported by a robust application that enables 5 major cross-divisional IBM teams to collaborate with clients to identify and manage projects, yielding client solutions that drive growth and expand wallet share.
- Instituted an application development process to manage requirements from identification through implementation, enablement, training, and support.
- Established help desk environment for more than 2,600 active end users managing 17,000 accounts.
- Proposed and helped establish a project office for our largest user set.
- Liaised with business unit executives to understand missions and objectives and translate to requirements.
- Managed overall relationship and expense budget with outside vendor.
- In 2012, CPM supported key clients in programs that resulted in \$1.6B in won revenue.

Executive Project Manager

2005 - 2006

- Established and managed the Intellectual Project (IP) Project Office, responsible for institutionalizing project management in the Corporate Intellectual Property and Standards Organization.
- Managed 6+ key projects, ensuring executive initiatives were rationalized and projects understood and executed.
- Project portfolio included 'Operation Phoenix', a critical, cross-divisional project charged with implementing an integrated campaign plan to neutralize undesirable patent speculation behavior and sought to minimize litigation to IBM, estimated at \$1.5M per patent per year.
- Led the design and development of the Sarbanes-Oxley compliant, Technology & Intellectual Patent (T&IP) Assignment Process to support the annual IP income target of \$1B.

Executive Project Manager

2002 - 2005

- Performed as overall Integration Project Manager in deploying Phase 1 of the integrated Asset Commercialization (AC) initiative for the Global Services AC Global Asset Operations Organization. Implementation of this strategy recognized revenue and profit growth from exploiting Intellectual Property on customer services engagements.
- Managed a \$1.5M project budget, leading a cross-functional, multinational project team to quality assure project deliverables and to release appropriate deployment communications.
- Controlled and managed the overall annual expense budget of \$13M that resulted in \$18M booked asset revenue \$44M in signings.
- Coordinated operational support desk procedures, ensuring currency and applicability.
- Developed an overall measurements package to establish, track, and monitor monthly checkpoints with key stakeholders to ensure a closed loop investment process.
- Performed as Project Development Team Lead (PDTL) for development, maintenance, and support of the Assets Innovation Web Site. Project managed upgrades to the qualification process, applications, and tools. Managed the help facility.

Senior Project Manager

2001 - 2002

- Managed projects in the Global Services Global Intellectual Property and Asset Commercialization organization. Organized, led, and recognized a diverse global team that was successful in implementing a solid level-one-maturity IP protect program, resulting in \$650K in royalties (profit) from patent cross-licensing.
- Achieved 1,200 patent disclosures, exceeding target by 36%.
- Achieved improvements in all key patent pipeline milestones.
- Developed and disseminated education and guidance across the worldwide community.

Senior Project Manager

1998 - 2000

- Managed projects in the Global Services Project Management and Integration organization. Integrated projects across towers and geographies in the \$1.5 billion IBM Global Account.
- Set common disciplines, process, and tools in place for project management throughout the account.
- Performed Project Management and Application Owner responsibilities for 3 IBM Global Services applications used for maintaining project baseline information for the IBM Global Account.
- Reduced costs by migrating key functions to 1 application and preparing and sun setting the other 2.
- Deployed a cost efficient mechanism for delivering application education to over 1000 employees.

Project Manager

As part of the Global Services Project management Center of Competence, provided proactive project management mentoring to 85 technical professionals responsible for \$13M in cost recovery.

Project Manager

1995 - 1997

Managed a team of 15 technical professionals, representing \$500K in cost recovery, to design and deliver an automated transaction messaging linkage between two strategic applications. Managed the MSM Worldwide Deployment External Design project, a \$1.2 million cost recovery effort with a team of 20 technical professionals.

Project Manager, Atlanta Committee for the Olympic Games (ACOG)

2001 - 2002

Managed the customization and deployment of the ACOG Application Development Methodology. Provided consultation, education and team building leadership in the methodology, systems and quality assurance support.

Education

MS, Mathematics for Teachers, Indiana State University

BS, Physical Education and Mathematics, Indiana State University

Certifications and Honors

Certified Six Sigma Black Belt (CSSBB)

Project Management Institute (PMI) Project Management Professional (PMP)

IBM Certified Executive Project Manager

IBM Bravo Award, 2010

IBM Systems and Technology Group Sales Initiative Operations Leadership Award, 2010

IBM Execute Now Award, 2002

Associations

Project Management Institute (PMI): Member, Kentucky Bluegrass Chapter Board (1999-2002, 2006-2008, 2013-2014)

Church Committee Volunteer

1996 Atlanta Committee for the Olympic Games (ACOG): Security Volunteer



Cory Camic
PMP®

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Summary

Business Development Professional with over 12 years of experience, with proven ingenuity in the areas of sales team development and management, as well as leveraging solutions-based selling to increase corporate profitability. Characterized as results-driven with excellent interpersonal and communication skills.

- Lead sales person for IT training corporation for over 4 years, with over \$1,200,000 in annual revenue. Consistently exceeds sales goals by an average of 40%.
- Ability to promote products and services while building strong customer relationships.
- Excellent networking and clientele building skills.
- Experience managing contracts for both the private and public sectors.
- Proficient in Microsoft Office, Excel, PowerPoint, Constant Contact, internet and email applications.
- Self-motivated while also having an overall collaborative team mentality. Comfortable managing personnel and taking leadership roles.

Experience

The Solarity Group

Business Development Manager

2014 - Present

- Develop new business, enhance existing client relationships, and serve as the “face” of the company to our clients and potential clients
- Responsible for all aspects of sales and marketing, including managing the company website and social media, client interaction, contract negotiation and document management, promotional activities and event coordination.
- Develop and coordinate training schedule for all Solarity classes, both those open to the public and private events.
- Serve as account manager with key clients to ensure customer satisfaction and project implementation.

NEW HORIZONS CLC

Strategic Account Manager

2006 to 2014

- Lead the Lexington division, personally accounting for generating approximately \$500k in sales annually.
- Achieved highest sales in the company each year from 2009-2012, exceeding corporate goals by up to 64%.
- Developed strong on-going client relationships in both corporate, government, and higher education accounts. Company point man for securing enterprise-level contracts with clients such as the University of Kentucky, Morehead State University, and the Bluegrass Area Development District via the Workforce Investment Act.
- Developed new clients, builds relationships with existing clients, often working with IT & HR Managers to customize long-term training strategies to achieve their training goals for their employees. Knowledgeable in course offerings, training and certifications in courses such as Microsoft, Cisco, Windows Server, VMware, Security, and Citrix.
- Exhibits excellent organization skills, handling the entire sale from contract negotiations, to invoicing and collections. Conducts business with efficiency and professionalism.

GUESS, INC

District Trainer

2006

Trained 5 Store Managers and 5 Assistant Managers in upper level management operations.

Store Manager

2004 – 2006

- Consistently exceeded sales goals, increasing annual store revenue from \$600k to \$1.3 Million.
- Tracked and analyzed Profit & Loss statements; implemented loss prevention policies resulting in decreased theft losses from 11% to 0.1%.
- Supervised up to 30 employees at a time; Ensured completion of all human resource functions, including interviewing, hiring, firing, employee evaluations, disciplinary actions, training and staff development.
- Repeatedly exceeded corporate expectations by enforcing focus upon customer care. Planned all floor moves and visual display changes during non-sales hours so sales force was 100% focused on customer service.

Co-Manager

2002 – 2004

Oversaw daily operations and provided excellent customer service.

Education



University of Kentucky, Lexington, Kentucky - Bachelors of Arts in Secondary Education with a focus on History & Political Science.

Graduated magna cum laude, with 7 consecutive semesters honored on the Dean's List.

Certifications and Honors

Project Management Professional (PMP) Certification (2015 - Present)

Associations

Director, Business Outreach: IIBA Bluegrass Chapter

Member: PMI Kentucky Bluegrass Chapter

Member: PMI Kentuckiana Chapter

Deacon: Northeast Christian Church

Collin Quiring

PMP®, MCTS, MCT, OPM3, MBA, CIRM collin@solarity.com

Summary

Collin has over 15 years of experience in several industries in Project Management, Resource Management, Product Development, Systems Administration, and Training. He has implemented Project Management Offices in several companies. His real world experience, combined with his relaxed teaching style, make his presentations and training classes practical and easy to understand. He has taught hundreds of students in the areas of Project and Resource Management and Microsoft Project, along with authoring a book on Resource Management using Microsoft Project Server.

In his role as a Project Management Consultant, Collin has often worked with clients during the sales cycle to understand their business objectives and challenges. He has helped to define solutions, co-developed the business benefits with clients, defined scope of work and deliverables, defined staffing plans and budgets, proposed iterative approaches with achievable phases to deliver initial business benefits quickly, and drafted appropriate statements-of-work.

As an expert in Microsoft Project, Collin has been honored by Microsoft to help write and review the certification tests given for Microsoft Project Professional, Project Online and Project Server. He assisted with the writing and the review for the 2010 and 2013 versions.

Experience

Project Management:

Collin has designed, organized and consulted on Resource Management, Project Management, Project Management Offices, Project Management technology and specific industry accepted Project Management Procedures in the following ways:

- Configure and implement new Project Management Office
- Develop Project Management Practice procedures in enterprise
- Implement Company Scheduling functions for Product Development from idea through production
- Develop training material for Project Server
- Develop training material for proper internal Project Management procedures using the Project Management Body of Knowledge (PMBOK) as a strong guide
- Taught training classes for all levels of users – from Executive dashboard review to daily functions of the user community
- Develop training procedures for the Project Management Body of Knowledge (PMBOK)
- Train users and management on daily interaction of using Project Server
- Train Project Managers and Resource Managers on proper usage of the Project Server
- Install, configure and administer Microsoft Project Server 2010, 2007, and 2003

- Install, configure and administer Microsoft Project Portfolio Server 2007
- Install, Configure and maintain multiple instances with separate user groups on Project Server
- Establish business and technological solutions to resolve current and future needs
- Determine the business and technological consequences of implementation
- Interface and coordinate with Project Management Office and Information Technology (IT)
- Ascertain and map out Business and Digital Work Flow processes
- Create and implement appropriate schedule templates for use by Project Managers
- Develop methodology for system administration – both business and technology administration
- Develop documentation for structures and develop methods for future documentation

These projects have enabled clients to improve their business, improve reporting consistency and timeliness, spot trends and take action sooner to mitigate problems and take advantage of opportunities, reduce costs, increase sales and improve efficiency and effectiveness.

Project Types:

Collin has worked on numerous types of projects in addition to those directly related to Project Management and Microsoft Project. Those projects have included the following business processes or technologies:

- SharePoint Server implementations and migrations (WSS, 2007, 2010 and 2013)
- Install, Configure and Administrate SharePoint Server (in-house farm, Azure, O365 and online)
- Install, Configure and Administrate Project Server (in-house, Azure, O365 and online)
- Virtual Worlds implementation– VastPark
- ScheduALL implementation and migration
- Windows Server analysis, procurement and implementation
- Schedule assistance – create, maintain and administer schedule
- Building construction – Independent and Assisted Living facilities
- Product Development for Classified device - manufacture and implementation
- Resource Management implementation

Training and Education:

Collin has written numerous training courses for internal organizational training. While most of these have been for in-person training, they can be used for web based online training. Some of the courses that Collin has taught are the following:

- Internal Business Processes specific to the organization
- Microsoft Project Server courses
- Microsoft Project Professional courses
- Standard business Project Management courses
- Business Economics courses

- Microsoft Office Suite courses
- Collegiate level courses in various computer topics

Along with specific courses, Collin has written a book about Resource Management and the use of Microsoft Project Server. The book was published in 2011 and is titled "Mastering Resource Management Using Microsoft Project and Project Server."

Education and Certifications

Organizational Project Management Maturity Model (OPM3)

Masters of Business Administration (MBA)

Bachelor of Science, Business Administration

Project Management Professional (PMP)

Microsoft Certified Trainer (MCT)

Microsoft Certified Technology Specialist (MCTS)

Formerly Microsoft called this: Microsoft Certified Professional (MCP)

Integrated Resource Management (CIRM)

Professional Associations

Member of the Project Management Institute (PMI)

Microsoft Project Users Group (MPUG)

Member of Kiwanis International

Member of the American Production and Inventory Control Society (APICS)

Continuing Education

American Management Association

Project Management

APICS Courses:

Enterprise Concepts and Fundamentals, Identifying and Creating Demand, Designing Products and Processes, Delivering Products and Services, Integrated Enterprise Management

Microsoft Courses:

SQL, Database Administration, Project Server, Project Professional, Project Management, MCDBA courses, MCSE courses

IBM Courses:

AIX Basics Plus, AIX System Management

Miscellaneous Educators:

Project Management, Electronic Data Interchange, Application Development, Microsoft Project

4. Number of years your company has been providing technology/consulting services

Solarity is a Kentucky-based Limited Liability Company (LLC) established in 2003 and headquartered in Lexington. The office that will serve as the primary contact is located 961 Beasley St., Suite 140, Lexington, KY 40509.

In our 13 years of operations, we have been providing and improving our training and consulting offerings related to project management, business analysis, and many other practices. Solarity's staff are all residents of Kentucky. We live and work locally, which reduces overall costs of engagements for Lexington-Fayette County and accelerates our ability to begin work and effectively respond to your requests. We also have extensive contacts with subcontractors who are deeply skilled and experienced in their industries and skillsets—we can draw upon people from across the nation (and internationally) to ensure the best fit for the desired client outcomes.

We actively contribute to the community and seek to improve our region as well as our profession by volunteering our time with civic and professional organizations.

Experience in the Government Sector and Private Industry

We enjoy working with clients across many government sectors, which have unique and varying perspectives and attributes regarding training and skill building. Government entities are encountering significant changes and challenges that put pressure on the organizations to be able to adapt to new environments, opportunities and constraints and we look forward to helping you meet those changes and overcome challenges through proactive and meaningful training.

We also have experience working in private industry and can bring together innovative ideas and best practices from different perspectives to help people think beyond their current horizon. As one of our current customers said, "Solarity's representatives are extraordinarily knowledgeable across a broad range of topics. Their experience in varied industries gives them the ability to figuratively speak many languages, learn and adapt quickly, and introduce concepts synthesized across industry practices."

5. Provide two references for IT services work your company has performed over the last year

The best way for you to learn about the exceptional team that we bring to this engagement to deliver outstanding results is by hearing the reviews from our previous clients. We look forward to the opportunity to help advance Lexington's movement toward its desired results!

1. Philip Brashear – System Director of Change and Project Management at KCTCS

- **Project Title:** KCTCS Project and Change Management Support and Services

- **Contact:** Email: philip.brashear@kctcs.edu
Phone: (859) 256-3100

- **Period of Performance:** September 2011 – April 2016

KCTCS created a Change and Project Management Office (CPMO) to manage its nine transformation strategies outlined in its Business Plan. Solarity was selected to develop and deliver training in the disciplines of strategic engagement, sponsorship, coaching, project management, and organizational change management. Solarity also developed overviews of Strategic Change and Strategic Engagement with the KCTCS's Professional Development Master Trainers, who now can deliver those independently. We also provided consulting in the development of an integrated methodology for Strategic Change called The KCTCS Way. Solarity helped to develop and conduct a Portfolio selection process for strategic initiatives for the executive Cabinet which required working with both individual members as well as the Cabinet. Solarity also helped manage projects in several of the strategic initiatives that were selected and helped to advance the use of KCTCS's Enterprise Project Management (EPM) environment.

Our involvement helped the CPMO to mature so that there is no longer a need for external assistance with the development of a methodology or project/program planning. KCTCS employees and contractors now have a better shared understanding of the terms, concepts, and processes related to change and project management. Strategic projects are now assigned project managers, and have named sponsors. The KCTCS Way methodology is fully documented and standard templates are created. The CPMO has added full-time staff positions, two of which are Directors responsible for working with Strategic Planning and the Strategic Portfolio of projects. Solarity also assisted with a Master Trainer initiative to help transition training courses to internal instructors to build internal capacity.

Solarity’s representatives are extremely knowledgeable across a broad range of topics. Their experience in varied industries...gives them the ability to figuratively speak many languages, learn and adapt quickly, and introduce concepts synthesized across industry practices.

– Philip Brashear, System Director of Change and Project Management



2. **Lonnie Lawson – President & CEO, The Center for Rural Development;
 Board Member, Kentucky Communications Network Authority (KCNA)**

- **Project Title:** KCNA Strategic Planning
- **Contact:** Email: llawson@centertech.com
 Phone: (606) 677-6000
- **Period of Performance:** September 2015 - December 2015

Governor Steve Beshear signed Executive Order (# 2015-574) to create the Kentucky Communications Network Authority (KCNA) and its governing board to manage the KentuckyWired open-access broadband network. KentuckyWired will create high-speed Internet connectivity throughout the Commonwealth to enhance economic development and workforce and educational opportunities while sustaining Kentucky’s economy for generations to come. One of the Board responsibilities listed in the Executive Order is to develop a strategic plan for—and provide policy direction to—the KCNA.

Purpose

This project’s scope was to facilitate and assist the KCNA management in the drafting of a strategic plan for review and adoption by the KCNA Board. The purpose of this document is to provide an up to date summary of this project. It consists of the following sections:



- Background and Methodology
- Key Milestones and Deliverables
- General Comments & Recommendations

Background and Methodology

The Commonwealth contracted with The Solarity Group (www.solarity.com) for project management and consultant-facilitated strategic planning services. The

project was structured by using our proven and inclusive nine-step strategic planning model facilitated by Solarity.

Kentucky Communications Network Authority Customized Strategic Planning Model



Vendor Requirements

Technology Assessment

Our broad range of experience and knowledge in a range of different industries allows us to customize our approach to fit the situation. We work in total partnership with our clients to understand their business needs and the current environment, and then match the right amount of process to meet the culture and the project.

Specialized Experience and Technical Competence

Microsoft Partner

We have Microsoft Certified Technical Specialists (MCTS) on staff, including one awarded the rare Microsoft Most Valuable Professional (MVP) on Microsoft Project for three consecutive years. Our partnerships provide us with access to some of the most innovative and talented Microsoft professionals in the industry today, including Microsoft Project and Portfolio Management partners.



Attachment A

Please reference Attachment A for the selected technologies Solarity wishes to provide to LFUCG for this RFP.

Microsoft Project Approach and Process

Make the most of your investment

Microsoft Project is an amazing tool (and can be quite frustrating if you don't understand how to use it successfully). We provide you with the advice, coaching, consulting, hosting, or training necessary for this tool to help achieve your objectives.

Microsoft Project Advice

Microsoft Project is a tool designed to assist your organization with Project Management, Resource Management and Portfolio Management. It has numerous features and capabilities. But, do you know how to use the ones that apply to you? It shouldn't be expected that you will use all the features available, but it's good to know whether you're using the ones you need. And to know what tools are available that best provide value to your organization.

We can help with the advice, instruction, coaching, and consulting to make this tool more effective for your needs. Along with direct advice for clients, we have a blog that highlights many features and "gotchas" about Microsoft Project.

Microsoft Project Consulting

In addition to Training and Advice we provide direct consulting. Whether you are trying to determine how to create a template, modify your existing system or get compliance from your Project Management practices and your Microsoft Project tool, we can provide the help that you need. Our goal is to allow you to use the tool to the best advantage of your organization's best business practices. The strongest compliance to the tool and processes are done when those two align. We strive to ensure that the setup and usage of the tool matches the methods and processes that your organization uses.

Microsoft Project Training

If you already have or are thinking about getting any of the many variants of Microsoft Project – whether Project Online, Project Pro Online, Project Server, Project Professional or even Project Standard – you should know what the tool can do for you. We provide training sessions customized for your version of the tool and your needs designed for your organization. Why attend a public course that tries to cover everything about everything when you only need parts of the course?

Not only do we customize the training for your organization but we customize the training by your audience. An Administrator, a Project Manager, a Resource Manager and a Team Member have different desires and needs from the tool – why not train them in only what they need to know?

And, as both a Registered Education Provider (REP) and Registered Consultant Provider (RCP) from the Project Management Institute (PMI) we can provide you with Professional Development Units (PDU's) for the time you spend in training. Part of the reason we can do that is because we aren't just teaching the tool – we are showing how the tool provides Project, Resource and Portfolio management.

Microsoft Project Installation and Configuration

If you are upgrading versions of Project or installing it new within your organization, we know the tips and tricks to make the installation successful. We understand all the variants and can help with your installation in-house, on Microsoft Azure or Online (with or without O365). But, installation is the technical part and while it is important, it isn't the most critical part. The real value lies in the configuration. We specialize in ensuring that the tool is setup for your needs. We ask the questions to make sure the tool is set to match your organizational methods and processes. We also configure it so that the tool can be modified as your needs change over time. The value of an installation comes to fruition when the tool works for you and not the other way around.

Microsoft Project Server Hosting

If you desire to have Project in the cloud or hosted in some other manner (Azure, Online, etc.) we are experts in hosting Project Server. We understand the many alternatives available to you

and can help you in picking the right version for your needs and in helping you with ongoing support, administration or hosting.

Support Services

Solarity has developed a Service Level Management Plan for providing our standard consulting, technical, and training services, along with a standard Service Level Agreement (SLA), which can be customized for specific client engagements. This Service Level Management plan and SLA entails focused attention to client expectations while remaining simple, flexible and cooperative. Solarity has developed a Client Satisfaction Process for both our consulting and training practices that will serve as the basis for our Service Level Management Plan and Service Level Agreement (SLA).

1. Is help desk support available?

Traditional help desk support is not provided by Solarity. However, we make our best effort to support our client at the highest levels to ensure client satisfaction.

2. When is support available throughout the week?

Effective support of in-scope services is a result of maintaining consistent service levels. The following sections provide relevant details on service availability, monitoring of in-scope services and related components.

Service Availability

Coverage parameters specific to the service(s) covered in this Agreement are as follows:

- Telephone support: 8:00 A.M. to 6:00 P.M. Monday – Friday
- Calls received out-of-office hours will be forwarded to a mobile phone and best efforts will be made to answer / action the call, however there will be a backup answer phone service.
- Email support: Monitored 7:00 A.M. to 9:00 P.M. Monday – Sunday
- Emails/Texts received outside of office hours will be collected, however no action can be guaranteed until the next working day. Emails will be responded to as soon as possible but no later than 24 hours after receipt.
- eLearning Technical Support: Monitored 24x7
- Emails will be responded to as soon as possible but no later than 24 hours after receipt. Typical response time is within 4 hours during normal business hours.
- On-site assistance will be provided within a mutually agreed upon timeframe during the business week (Monday through Friday).

Additional Service Level Management Plan and Service Level Agreement (SLA) information is available upon request.

3. Do you provide a process for escalating support issues?

Yes, Solarity has a process for issue escalation.

Issue Escalation

Any items identified as issues that cannot be resolved between the client and service provider through means of daily communications and meetings shall be escalated for purposes of resolution to the next level of authority as identified below based on the roles for each respective project:

For client to escalate with vendor

Name	Title	Email and Phone
	Project Manager	
	Relationship Manager	
Sue Knies	Practice Manager	sue.knies@solarity.com
Bud Ratliff	President	bud.ratliff@solarity.com 859-539-9161

For vendor to escalate with client

Name	Title	Email and Phone

4. How are charges for support structured, documented, and tracked?

Charges for support are structured in the same manner as any project work. The hourly rate of the resource performing the work will be charged to the client, unless the support issue is related to the performance of the contractor. In which case, effort to resolve the issue will not be considered billable time.

Software Development

Composable Systems – Sub-contractor Information

Composable Systems is a full service software development company. We have business analysts, project managers, and quality assurance staff, but have also worked with companies that provide their own project management and business analysis for requirements gathering. The team takes an Agile approach to software development seeking to present our work to the client as often as possible and easily adapting to changes in scope. Our philosophy is that the requirements emerge as the project continues. We have used both a Scrum and Kanban approach depending on which suits the client and project best.

Consulting

Solarity is pleased to submit our qualifications in response to RFP #13-2016 for Information Technology Consulting and Technical Services. Solarity and its associates have provided such services to both local and global companies and organizations, including notable Kentucky-based institutions in state and local government, higher education, as well as many other diverse private, public, and non-profit organizations across a range of different industries.

Solarity's passion is to help build value from inspiration to implementation. People and organizations come to Solarity when they desire a high-quality result. It is easy to work hard on things that won't help accomplish the desired outcome. That is why we always seek to clarify the desired outcome first so that we have a shared vision of what the right things are for us to accomplish, and then bring our collective experience to bear to ensure we're doing them the right way.

Our primary business focus is to assist organizations with strategic and organizational changes that require the synchronization of people, processes, platforms, and content. We have a Practice Management Office that helps develop and deliver integrated consulting and training practices in Portfolio/Program/Project Management, Organizational Change Management, Business Analysis, Strategic Planning, to name a few.

Our consulting practice is focused on building the capacity and skills of employees to enable project success and manage operations efficiently and effectively. While we bring extensive knowledge and expertise to the table, we recognize that every organization is unique and that the people in that organization usually have the ability – given appropriate guidance, knowledge, capability, and tools – to realize and achieve their objectives and strategies. We enable our partners through “right-sized” consulting and other practices to enhance their inherent strengths and bolster their areas of development.

We are eager and would be honored to more directly support Lexington-Fayette Urban County Government (LFUCG) to:

- Increase efficiency and success of LFUCG projects and operations,
- Assist LFUCG's Information Technology resources and others across all LFUCG departments,
- Utilize both industry best practices and emerging techniques and technologies to advance the projects and initiatives of LFUCG,
- Help LFUCG maintain a core staff of knowledgeable and professionals to support and manage essential projects and operations for departments throughout LFUCG, and
- Guide LFUCG to define measurable goals and empower the Information Technology community to achieve results.

Consulting Services for this RFP

Solarity consultants are professionals who have years of real-world experience in their fields. For this RFP, Solarity proposes to provide technical leadership and guidance to LFUCG's Information Technology Department through the following consulting services:

- Business Analysis (including **Technical Requirements Gathering**)
 - Requirements Gathering
 - Process Documentation

- Needs Assessment
- Strategic Planning (including **IT Strategic Planning**)
- **IT Governance**
- Project, Program, and Portfolio Management
 - including **IT Project Management**, and
 - **Certified Project Management (PMP)**
- Organizational Change Management

We describe our services in more detail below.

Specialized Experience and Technical Competence

We have been implementing value-add service solutions for the success of our clients since our business began.

Solarity has provided project, program, portfolio and change management, business analysis, information technology consulting, strategic planning and training services to organizations throughout the Commonwealth of Kentucky and contiguous states for many years. In many of these engagements, the Solarity business consultants have served as the integrator for our clients, bringing together the components that lead to successful outcomes.

Business Analysis

Since Solarity's inception in 2003, we have been assisting our customers to help generate requirements for project and service delivery through the practice of Business Analysis. Our skilled Business Analysts can assist customers through facilitation, requirements elicitation, process documentation, needs assessment or coordination of requirements and testing. Additionally, we can help increase Business Analysis knowledge and skills for continuous improvement through training.

Professional Associations

In 2013, Solarity helped to charter and sponsor the local Bluegrass IIBA Chapter, and has continued to be heavily involved with the chapter. Solarity has several staff members that either currently or previously have served the chapter in both board and leadership positions. Additionally, Solarity is a charter sponsor of the chapter, regularly hosts and sponsors the monthly chapter meetings, and provides expert speakers for chapter events.

Solarity is also very well-versed in the PMI® Business Analysis Practice Guide and the PMI Professional in Business Analysis (PMI-PBA®) certification.

Strategic Partnership

Solarity has excellent practitioners and trainers in Business analysis, but has also partnered with B2T Training to provide extraordinarily high-quality Business Analysis training content and instruction. Since its inception in 2000, B2T Training has focused solely on providing business analysis training and professional development in traditional and agile approaches. B2T brings

over 25 years of experience to provide the highest quality business analysis training and support for ongoing development of business analysis professionals. Attributes include:

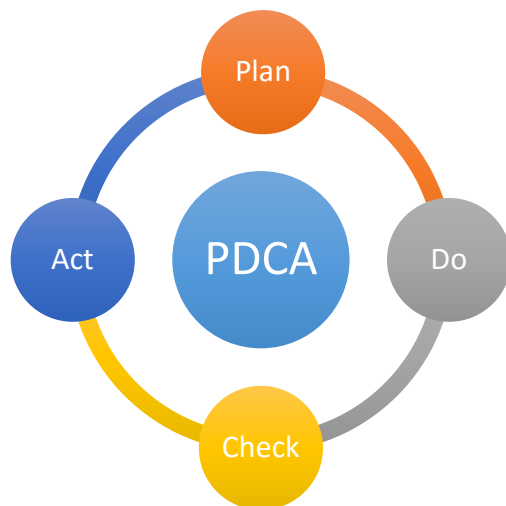
- Instructors, coaches, and course developers that are business analysis experts
- Founding member of the International Institute of Business Analysis (IIBA®) and endorsed education provider since 2003
- Registered Education Provider for the Project Management Institute (PMI®)
- Full suite of offerings: Instructor-led training, Virtual Live training, On-Demand training, Webinars, Workshops, Mentoring, Consulting, Coaching and Curriculum Development

As experts in the field, B2T Training continues to shape the Business Analysis discipline and the careers of BA professionals in major corporations across the globe through its high impact training sessions and valuable resources.

Strategic Planning

Strategic planning is a **disciplined process** that produces **fundamental decisions and actions** that shape and guide what the organization is, what it does, and why it does it. By thinking strategically and developing effective goals and strategic initiatives, organizations create the means to achieve their vision and accomplish their mission. The strategic planning process also must provide ways to continuously monitor progress, track environmental conditions, alter processes and direction, and rapidly respond to opportunities and challenges.

Solarity Strategic Planning Process Model (SSPPM)



The SSPPM includes not only the development of strategic plan but also processes to assist with the execution and continuous improvement for an organization to successfully manage its accomplishment. Many times strategic plan “documents” are developed and remain on the book shelf collecting dust and not referenced in day to day management or operational environment. The achievement and implementation component as explained below is to measure the strategic plan achievement to enable adjustment of the strategic plan as necessary to succeed. Our SSPPM process is modeled on the Plan-Do-Check-Act model for ensuring continuous improvement.

The Solarity Strategic Planning Process Model (SSPPM) provides a nine-step, progressively elaborated approach to strategic planning. We adapt this proven process to the unique conditions of each engagement as it unfolds, producing the most valuable results. As each component is generated, it becomes a building block for the remaining components.

Solarity **customizes** this process model based on the specific needs of a customer, which may include additional content or a particular focus of some aspects of the SSPPM. Regardless of the tailoring involved, the one constant is our discussions with the customer describing how this approach is a process to build vision, unity, and commitment, and not just a document.

Team Approach

Solarity uses a **facilitated** team approach that includes a full planning team representing a comprehensive cross section of stakeholders and a core team representing a subset of the full planning team. Each team has specific roles in the strategic planning process:

- the full team assists with the draft of the strategic plan and provides regular review and comment;
- the core team synthesizes and integrates input and feedback from the full team and develops the final plan.

This process of two-way communication between the two teams is called “pipelining” and is used throughout the life of the planning process.

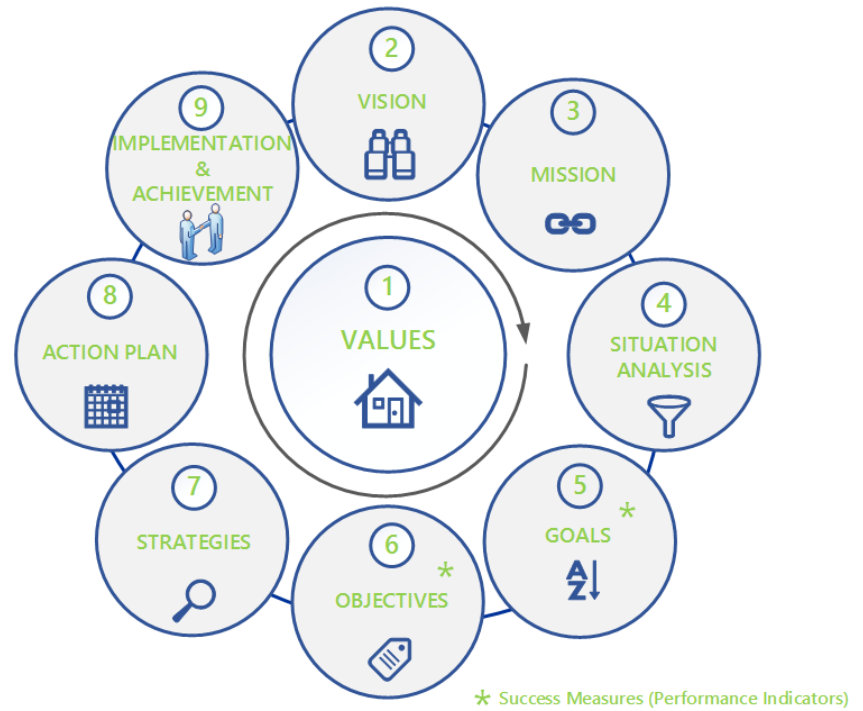
Why a Team Approach to Strategic Planning?

The Solarity methodology includes skilled facilitators who use a variety of facilitation techniques that ensure full participation by all team members. These techniques reflect the belief that all input is valued and every view deserves to be heard.

The Team Approach has the following benefits for developing a strategic change:

- Brings different views to the planning process, which ensures a balanced, cohesive plan;
- Encourages expression and evaluation of different viewpoints before they become part of the written plan;

Solarity Strategic Planning Model (SSPM)



- Gains agreement on important issues and builds support for the written plan;
- Stimulates constructive conflict and ensures important issues are addressed.

Solarity resources have extensive experience across the strategic planning services continuum as well as facilitation services that include:

- Development of strategic planning model process for the Commonwealth’s Executive Branch agencies through the EMPOWER KY program
- Development of a strategic planning model for the Commonwealth’s information technology business integrated with the Commonwealth’s agency program/management strategic plans
- Consulting and facilitation assistance with strategic planning for Commonwealth’s state agencies providing statewide services (Commonwealth Office of Technology and Kentucky, Department of Libraries and Archives, and CPE’s Kentucky Virtual Library)
- Consulting and facilitation assistance with strategic planning for local/community non-profits (libraries, Girl Scout councils, etc.)

Standards

We hold ourselves to standards that help us produce the most valuable and high-quality result for our customers.

- **Focus on Customer Needs:** We customize our standard strategic planning components to best serve the needs of the client.
- **Inclusiveness:** We work to ensure that all key stakeholders have the opportunity for input on a strategic plan’s development to help promote shared commitment to achieving the strategic plan. This also includes providing additional opportunities to solicit input and feedback from stakeholders who are not able to participate in the planning process.
- **Timely and Comprehensive Two-Way Communication:** Use of tools and technique to enable responsive, efficient and thorough exchange of information and interactions between the sender and receiver of the communication.
- **Consideration for Participants:** We keep in mind the need to honor participants’ time commitments and help balance our collective planning activities with their professional and personal environment.
- **Facilitation:** We employ effective facilitation techniques that seek to create the most optimal environment possible so that the best ideas of all stakeholders come together and generate the most useful and practical plan possible.

IT Governance

Information technology exists to provide value to the organization. Our IT Governance consulting facilitates the conversations and decisions necessary to develop a “right-sized” structure that helps align work being performed with the strategic outcomes desired by the organization. Our inclusive approach—aligned with our strategic planning practice—uses strategic engagement to help the organization develop the roles and responsibilities, decision-

making framework (guiding principles), and processes needed to ensure the delivery of value and the management of threats and opportunities. We also help develop metrics to measure both the value and risks associated with Information Technology.

We recognize that IT Governance consists of the overall IT Organization as well as enterprise systems or applications (such as Asset Management, PeopleSoft, RouteWare, or Accela, for example).

Our IT Governance consulting practice includes both approaches. Recent example of our work includes Guiding Principles for IT across the Commonwealth of Kentucky, as well as the development of a governance model for the Commonwealth's Kentucky Enterprise Learning Management System (KELMS), which included the collaboration of over 30 state agencies representatives to develop shared governance for oversight and enterprise level management through a KELMS Governance Committee.

Project, Program, and Portfolio Management

Project Management

Our experienced project managers will partner with you to select, manage, and complete projects successfully.

We assess the situation and appropriately recommend the right amount of process needed to meet the project's goals, and no more. Throughout the course of the project we consistently apply appropriate knowledge, skills, tools, techniques, guided by situational leadership to ensure success.



We recognize that success means different things to different clients, and we work to ensure we converse with the right people to define how success is measured, and ensure we build the project plan appropriately.

Program Management

Often organizations have several projects in the same area, or working towards a common goal. Through the practice of program management, we can reduce conflicts between projects, and coordinate shared resources, increasing the ability to achieve benefits. We'll bring our experienced program managers to help coordinate with executives and project managers across several projects.

Portfolio Management

Let's face it. There are always more strategies to be done than time, money, and people to do them. We help you select the initiatives that will give you the most value for your investment. We'll help define business drivers and can provide tools to help the process.

Assessments

Assessments of your current environment allow areas of focus to become more clear. Our team will help assess the current state of your people and processes, then identify investment areas that will produce the best results in the shortest time.

Professional Associations

Both Solarity core staff and dedicated subcontractors possess years of experience in project, program, portfolio, and organizational change management, across a variety of industries. Solarity is very involved with the local PMI chapters in both Lexington and Louisville, with several staff members either currently serving or previously serving as board members of the PMI Kentucky Bluegrass Chapter, including both our President and Chief Operating Officer (who were past Presidents).

Organizational Change Management

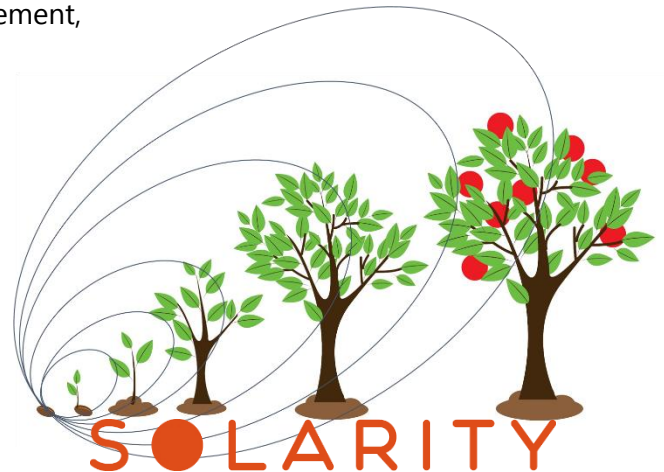
It's Time Things Changed

Solarity's experience with organizational change management is entrenched within all its practices and core values. Change is at the core of all we do. One of our unique strengths is in our integrated approach to strategic planning, portfolio management, program management, project management and change management. Because change is almost always uncertain, we employ an approach that establishes a strong foundation by:

1. ensuring people share a common vision and
2. the right people are in the right seats to lead significant cultural change in a successful way that is sustainable.

Coupled with our expertise in strategic planning, engagement, training design and delivery, and business analysis, we possess the knowledge and skills to implement well-considered, comprehensive solutions, from the inspirational strategic plan down to the smallest task leading toward complete implementation.

Making significant changes requires that people be given the information, understanding, time, and support needed to grow into their new state of being. Our approach recognizes that cultural change initiative being undertaken by LFUCG is not simply a matter of putting a plan on paper, it is planting seeds that will grow and bear fruit over the course of many years.



Success or failure?

Any solution can be implemented on time, in budget, and meets the requirements given, yet can still fail if the people who use it don't want it or have the necessary knowledge, ability, or support to use it. Solarity can help you navigate the organizational changes you are facing

Training

Solarity staff have developed and delivered training to customers and valued partners both nationally and internationally. Our approach is to provide well-crafted training that fits the needs of our customers. Though we can deliver standard courses, we more often customize our delivery to fit the specific outcomes of the organizations to which we deliver training solutions.

Our instructors are all practitioners of the practices covered in our courses, which provides students with current theory balanced with deep experience making these practices work in many real-world environments.

Our courses cover:

- Strategic Change and Engagement
- Portfolio, Program, and Project Management
- Organizational Change Management
- Business Analysis
- IT Service Management
- PMP Certification
- Project Management Toolsets, such as SharePoint and Microsoft Project Server
- Many others...see our website at <https://solarity.com/training-courses/course-listing> for more of our courses

Capacity to Perform the Work Outlined in the RFP

We have a strong core of full-time employees, several key part-time contractors, and a trusted range of strategic partners with whom we work on particular engagements, all of whom are deeply skilled in their industries and disciplines.

Certifications and Staff Credentials

Registered Education Provider (R.E.P.)

Solarity is one of only four R.E.P.'s approved by the Project Management Institute (PMI) in the Commonwealth of Kentucky. This status means Solarity meets requirements established by PMI® and can deliver Professional Development Units (PDUs) for continuing education credit.



This designation qualifies us to offer training in project management and issue professional development units (PDUs) to meet the continuing education requirements needed by PMI® credential holders.

To earn the R.E.P. designation, a provider must meet or exceed rigorous [standards](#) for quality and effectiveness as defined by PMI®.

Staff Certifications

Our staff hold a large number of credentials and certifications, including:

- Project Management Professional (PMP)®
- Advanced Prosci® Change Management
- Certified Lean Six Sigma Black Belt
- Appreciative Inquiry
- Microsoft Certified Trainer (MCT)
- Microsoft Certified Systems Engineer (MCSE)
- IBM Certified Executive Project Manager
- Senior Professional in Human Resources
- CompTIA Project+
- Microsoft Certified Technology Specialist
- Lean Systems Certification
- Certified Public Manager
- Certified Strategic Planning Facilitator
- Certified Business Analysis Professional (CBAP®)
- ITIL® Foundation

Staffing and Skill Levels

Solarity staff and contractors possess a broad range of experience and knowledge in a range of different industries, allowing us to customize our approach to fit each situation. We work in total partnership with our clients to understand their business needs, the current environment, and then match the appropriate resource for each consulting and training engagement.

Staffing Levels and Locations

All Solarity staff, 1099 contractors, and subcontractors located in Kentucky and contiguous states. Personnel that may provide services to the Commonwealth include:

- Solarity full-time staff:
 - Instructors (4)
 - Support Staff (2)
- Solarity part-time contractors:
 - Instructors (4)
- Solarity partners:
 - Instructors (10)
 - Support Staff (2)

Additional resources may be added based upon specific subject matter expertise required by LFUCG.

Staffing Skill Levels

Solarity staff and contractors hold a large number of credentials and certifications to demonstrate experience and skills including, but not limited, to:

- Solarity staff (includes the number of certification holders):

Project Management Professional (PMP)®	6
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Prosci® Certified Change Practitioner	4
Advanced Prosci® Certified Change Management Practitioner	1
Appreciative Inquiry	1
Certified Lean Six Sigma Black Belt	1
Certified Public Manager	1
Certified Strategic Planning Facilitator	1
CompTIA Project+	1
IBM Certified Executive Project Manager	1
ITIL® Foundation	1
Microsoft Certified Professional	1
Microsoft Certified Systems Engineer (MCSE)	1
Microsoft Certified Technology Specialist	1
Microsoft Certified Trainer (MCT)	1
Senior Professional in Human Resources	1

- Subcontractors:

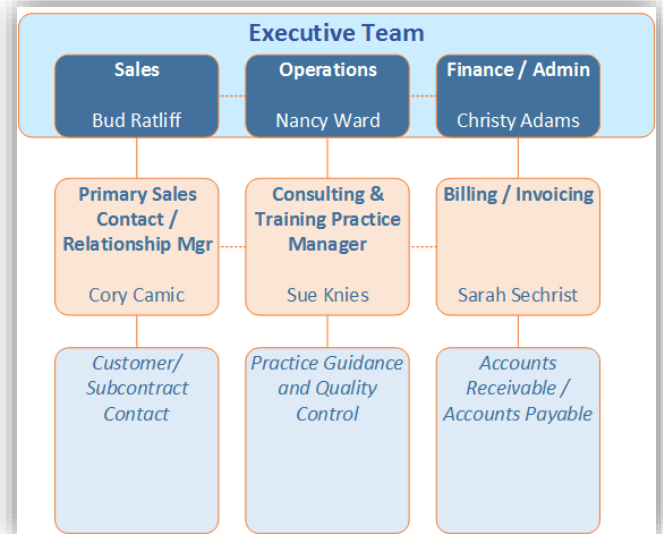
Certified Business Analysis Professional (CBAP®)	8
Project Management Professional (PMP)®	3
Microsoft Certified Professional	3
ITIL® Foundation	2
Certificate in Integrated Resource Management (CIRM)	2
Distinguished Professional in Service Management (DPSM®)	2
ITIL® Expert	2
OPM3	2
Certified Lean Six Sigma Black Belt	1
Accredited ISO/IEC 20000 Foundation and Intermediate instructor	1
Accredited ITIL® Foundation instructor	2
Auditor in Service Management according to ISO/IEC 20000	1
COBIT 5 Foundation	1
HDI Support Center Analyst	1
HDI Support Center Manger	1
HDI-Certified Auditor	1
ISO/IEC 20000 Executive Consultant Manager (ECM)	1
Lean Systems Certification	1

Additional resources may be added based upon specific subject matter expertise required by LFUCG.

Solarity Organizational Chart

Solarity’s Executive Team oversees all major functions related to the organization. For this engagement, Cory Camic will be the primary contact and relationship manager. Sue Knies, our Practice Management Office Director, will oversee the quality of consulting engagements. Sarah Sechrist will handle all billing-related activities in coordination with Cory Camic. Any issues may be escalated to the appropriate executive contact.

Additional staff are available to perform tasks as needed for LFUCG under this contract.



Oversight Mechanisms to Ensure Quality

Solarity Client Satisfaction Process

Solarity has developed a Client Satisfaction Process for both our consulting and training practices. For all engagements, Solarity will assign a client relationship manager, which will be the primary contact for the contract, or other appropriate staff members. The relationship manager is responsible for ensuring client satisfaction through commitment to quality and meeting the needs of each client. Mechanisms utilized throughout the client satisfaction process include, but not limited to:

- Pre-engagement meetings to gather requirements,
- Documented consulting approach and Statements of Work (SOW) to gain client approval,
- Point of escalation for any issues that occur during the consulting period,
- Solarity internal lessons learned meetings to review compiled client satisfaction and impressions,
- Preparation of project final reports,
- Meetings with project sponsors (client) to review compiled evaluations and final report, and assess overall Solarity quality of service,
- Potential adjustments to consulting service delivery as part of our continuous improvement process.

Additional oversight mechanisms are documented in the Service Level Management Plan and Service Level Agreement earlier in this section under Support Services.

Our Values

All our people and practices are centered on our core values, which help us ensure we can provide the Commonwealth with the highest quality work in the best possible manner, continuously improving our ability to deliver sustainable results over time:

- **Quality**—We are committed to delivering valuable results for the greater good of our customers by using proven practices and highly skilled people; we gain quality through...
- **Wellness**—We believe we do our best work when we are spiritually grounded, have healthy relationships with our customers, family, and friends, and practice healthy behaviors—healthy behaviors lead to good...
- **Continuous Improvement**—We are always assessing performance and adapting practices to achieve better results—identifying these areas to improve allows us to...
- **Focus**—We relentlessly focus on those areas that help us strategically grow and sustain our capability to deliver value, which produces high **Quality** results.

Past Record of Performance with LFUCG and other Governmental Agencies

LFUCG Consulting Engagements

Beginning in June 2014, LFUCG selected Solarity to serve in the Office of the Chief Information Officer (CIO), providing project management services for several of the city's enterprise projects under the direct supervision of the CIO. In this capacity, Solarity has managed multiple projects, including:

LEXrev Occupational Tax System

The LEXrev project to replace the city's legacy mainframe system with a modern Occupational Tax system that effects every business and individual working within the Lexington-Fayette County municipal borders. This effort not only involved replacing LFUCG's legacy mainframe system, but also reviewing and improving over 30 business processes which affected 25+ key users. Organizational Change Management was a key component to this project's success.

Active Directory Migration

LFUCG contracted Solarity for project and change management business consulting to help define the Active Directory Migration project, use that information to help select a technical vendor, and then manage the design and implementation of its existing Active Directory in order to support a higher level of security. The objectives of this project are to provide the right mix of project, change, and business consulting to enable LFUCG to most effectively meet its project goals throughout the lifecycle of the project.

LexBud Budget System Update

LFUCG contracted Solarity for project management and change management business consulting services for the city's Budget System update project. The business consultant will serve to review the implementation vendors' (Metaformers, Inc., Oracle Corp, and Linium, Inc.) contract and project plan, provide management services for LFUCG tasks, create and manage the Change Management Plan, document and manage project risks and issues, manage all project documentation and artifacts.

GigforLex Gigabit City Project

Utilizing best practices and the appropriate amount of process, the Solarity project manager coordinated the project steering committee, developed a project charter, and established a stakeholder register. Solarity managed RFI development for the city, which proved to be very beneficial to LFUCG's broadband planning, and is a model that could be duplicated in other communities creating cost and resource efficiencies for the Commonwealth.



Lexington-Fayette Urban
County Government

Solarity has been engaged to facilitate Lexington's GigforLex project for about a year. The project manager's facilitation, documentation and diligent follow-up with our vendor RFI responses has been excellent. Solarity's continued interaction has been critical to keep this project moving.
- Aldona Valicenti, Chief Information Officer

IT Applications Division Project Management and Support Services

Beginning in December 2015, LFUCG selected Solarity to implement project management standards in the IT Applications division. The IT Applications division provides software development, software support, and database maintenance for programs used within LFUCG. The section also assists in the purchase, deployment, and maintenance of third-party software solutions. Additionally, the Applications sections also includes the Geographic Information Systems (GIS) office, which maintains all geographic data, supports GIS applications, and provides mapping services to LFUCG and the public. Our work in IT Applications is similar to the work we have performed for the Office of the CIO.

Our work began by documenting each of the 40 projects currently in progress in the division, and adding 10 additional projects that had no documentation. Using portfolio management

techniques, we have prioritized all the projects using Microsoft Project Server Online, and created a dashboard for ease of executive reporting.

Initial work has also included:

- Creation of a skills matrix for the division staff for use in resource management
- Implementation of standard forms and templates
- Establishment of regular meeting cadence among staff
- Beginning work for project governance

As with all of our client engagements, we have established clear/documented roles and responsibilities, utilized Microsoft Project Online for scheduling and document sharing, and integrated our standard methodology, which includes:

- Strategic Engagement
- Organizational Change Management
- Portfolio, Project and Program Management
- Project Leadership and Sponsorship

Additional Government Consulting Engagements

Kentucky Community and Technical College System (KCTCS)

KCTCS selected Solarity as its partner to provide training and consulting that helped their employees better understand and begin to adapt to a changing world through the notion of “Strategic Change” as it related to nine significant transformational strategies identified in its 2011-2016 Business Plan.

We worked with the Change and Project Management Office (CPMO) to develop and deliver an integrated curriculum and internal training that introduced the concepts and practices of Strategic Change, Portfolio, Program, and Project Management, Organizational Change Management, Business Process Analysis, Coaching, and Sponsorship. We helped develop a methodology combining several integrated disciplines that build the capacity of KCTCS to change more quickly, with more flexible processes, and with greater strategic alignment.

Solarity also worked with this newly chartered the CPMO, President, and Cabinet in modeling a Project Portfolio Prioritization and selection process, and reported to several cabinet members on the execution of some transformational projects, along with other executives, mid-level supervisors, and front-line employees (both faculty and staff). We developed standard templates and helped to document an integrated methodology called the KCTCS Way that brought together best practices from:

- Strategic Engagement
- Organizational Change Management

- Portfolio, Project and Program Management
- Project Leadership and Sponsorship

In support of this methodology, Solarity developed and delivered training on:

- Project Management
- Organizational Change Management
- Introduction to Strategic Change
- Strategic Engagement
- Sponsorship
- Coaching

Solarity also assisted with a Master Trainer engagement to help transition training courses to internal instructors to build internal capacity.

We helped to implement and configure an Enterprise Project Management framework based on the Microsoft Project Server/Project Online environment.

[Kentucky Enterprise Learning Management System \(KELMS\)](#)

The Finance and Administration Cabinet and Kentucky Government Services Center (GSC) selected Solarity to provide assistance with the KELMS initiative, which upgraded a severely outdated learning management system. The goal of KELMS was to establish an enterprise-wide system to administer, track, and report on employee training and development for all 30 Commonwealth executive branch agencies involving over 30,000 Commonwealth employees. KELMS serves to centralize the learning process across the Commonwealth making the management of training information more effective and efficient as well as minimizing inter/intra agency duplication of effort. This project involved the collaboration and coordination of over 400 agency training coordinators as well as the software vendor. This project also the establishment of a Commonwealth standard training nomenclature/ terminology.

Solarity also facilitated the development of a KELMS governance model, which included the collaboration of over 30 state agencies representatives to develop shared governance for KELMS for oversight and enterprise level management through a KELMS Governance Committee.

[Commonwealth Office of Technology \(COT\) Strategic Plans](#)

The Commonwealth Office of Technology (COT) selected Solarity to generate its 2014-2018 Strategic Plan with a cross-functional team from across the entire executive branch. This process generated consensus for the things that COT must do not only internally to improve its efficiency and effectiveness but also what the rest of the enterprise must do, working more closely with COT, to achieve their own internal improvements.

All major IT projects and initiatives in support of the Governor's priorities (affordable health care, economic development, and quality education) adhere to and are supported by the elements

outlined in Kentucky's IT strategic plan. Some of these major IT initiatives include: Broadband, IT Infrastructure Initiative (I.3), KY Early Warning System (KEWS), and KentuckyWired Network (KYW).

Reference: <http://technology.ky.gov/about/Pages/StrategicPlanning.aspx>



Solarity's team brought years of strategic planning experience. This major effort could not have been accomplished without their knowledge and dedication. All who participated commented that they were as invested in the success of the project as the Commonwealth participants.

– James M. Fowler, Chief Information Officer

Our Clients/Industries Served

Solarity and its associates have provided services to both local and global companies and organizations, including many notable Kentucky-based organizations and businesses as well as many other diverse industries:



Industry Served	Client
State Government	Commonwealth of Kentucky Finance and Administration Cabinet Commonwealth Office of Technology Personnel Cabinet

	Cabinet for Family and Health Services Administrative Office of the Courts
Higher Education	University of Kentucky Morehead State University Eastern Kentucky University Sullivan University Kentucky Community & Technical College System (KCTCS) Kentucky Council on Postsecondary Education – Kentucky Virtual Library
City/County Government	Lexington Fayette Urban County Government Bluegrass Business Development Partnership Downtown Lexington Corporation
Manufacturing	Toyota Tempur-Sealy ACL Lexmark Brown-Forman CTS Grote Industries ITW Paslode Kyosan Denso Manufacturing Lexmark Siemens Woodford Reserve Distillery
IT/Software	CorrectCare Mirazon Composable Systems ATA Apax Business Computer Concepts Computer Training Solutions Fort Knox National Company KiZAN Koinonia Computing Tenmast Software ACS / Xerox

Healthcare	UK HealthCare CHI Baptist Health Jessamine Christian Health Care Lexington Clinic Norton Healthcare St. Claire Regional Medical Center
Consulting/Training Groups	Asentus Consulting Group Buckhead Management ETI Performance Improvement ExecuTrain Tandem Health Tech Solutions Keane/NTT Data Lantech Training
Pharmaceutical	Catalent Pharma Solutions MAPI
Marketing Agencies	Cre8tive Group
Banking	Forcht Group Republic Bank
Construction	Prestress Services Industries, LLC, Mason and Hanger
National or State Security-related	Kentucky National Guard L-3 Communications Battelle NANA Pacific
Local Libraries	Anderson Public Library Laurel County Public Library Woodford County Library
Non-profits	United Way of the Bluegrass Wilderness Road Girl Scout Council

Benefits to LFUCG

- **Experience with and Knowledge of Kentucky Government:** Solarity team members have over 55 combined years of experience working with local and state government at all levels and across multiple agencies. We have successfully led enterprise wide transformational initiatives, including one that developed an enterprise wide strategic planning model on which the current Kentucky model and Solarity model are based. Our team members have also worked on statewide information systems' design and implementation involving county government related and local non-profit organizations. These strategic initiatives and experience have increased our awareness and understanding of government and community needs and preferences making Solarity a natural choice for this engagement.
- **Experience with Similar Projects:** Solarity has experience in the engagement of all levels of an organization. We have worked with front line staff, mid-level administrators, executives, and community stakeholders to produce meaningful results. We have also demonstrated experience in performing similar approaches requested in this RFP.
- **Local Presence and Involvement:** Solarity resides in Lexington. Having worked with LFUCG both presently in the past on multiple engagements, we understand that collaboration is a core value. Our proximity downtown Lexington enables us to collaborate face-to-face, rather than by conference call—without unnecessary travel expenses—and makes it possible for us to provide a level of responsiveness not available from most other companies. A proud member of Kentucky Chamber of Commerce, Commerce Lexington, and the Woodford Chamber of Commerce, and as longtime members of and volunteers within the community, Solarity can help not only to craft solutions, but bring together a range of local resources in the service of this initiative.

Incomplete or Cancelled Projects

Solarity has not participated in any incomplete or cancelled planning projects within the past five years, with the exception of one enterprise IT project with the Commonwealth of Kentucky that lost funding to state budget cuts.

Familiarity with the Details of the Project

At Solarity, our niche is to “build success by doing the right things the right way at the right time.”

Doing things right means generating a shared vision of success, developing an environment in which success is possible, selecting the optimal methodologies and tools, and being strategic about when they are applied.

For this initiative, we recommend an approach which will integrate the relevant components of several different methodologies that allow us to ensure we're doing the right amount of work (not too much OR too little) to produce the right results at the right time. We base our approach on our experience in working with LFUCG, thought leadership, and other techniques we've studied, applied, and adapted for use in other successful engagements.

As we understand it, the outcome of this RFP is to assist LFUCG to support a wide range of technologies, processes, and projects that are both time-sensitive and mission critical. Through our consulting services, Solarity can supplement LFUCG Information Technology staff to potentially provide:

- Technology assessment and implementation services on technologies where we have expertise
- Consulting services in the following areas:
 - Business Analysis
 - Requirements Gathering
 - Process Documentation
 - Needs Assessment
 - Strategic Planning
 - IT Governance
 - Project, Program, and Portfolio Management
 - Organizational Change Management

Degree of Local Employment

Solarity is headquartered only 5-10 minutes from downtown Lexington, Kentucky. The office that will serve as the primary contact is located at 961 Beasley Street, Suite 140, Lexington, KY 40509.

Solarity's staff are all residents of Kentucky, with long-term roots in the Commonwealth. We live and work locally, which reduces overall costs of this engagement for LFUCG and accelerates our ability to begin work and respond to your requests in person, if necessary.

Solarity has been in business for 12 years and has been providing this type of consulting since we were established. We have a strong core of full-time employees, several key long-term subcontractors (1099), and diverse trusted subcontractors with whom we work on particular engagements who are all deeply skilled in their industries and skillsets.

Additional local resources may be employed or subcontracted by Solarity based upon the needs of LFUCG during the duration of any contract resulting from this RFP.

For additional staffing information, please reference Staffing and Skill Levels from earlier in this section.

Cost of Services

1. A fee schedule that includes hourly rates for proposed services

Solarity Fee Schedule for Work Under RFP #13-2016	
Consulting Service	Hourly Rate*
Technical Requirements Gathering (Business Analysis)	\$156
IT Strategic Planning	\$178
IT Governance	\$178
IT Project Management	\$156
IT Project Coordination	\$125
Certified Project Management (PMP)	\$156
IT Project Coordination	\$225
Organizational Change Management	\$156
Software Development	\$175
Training	N/A**

*Hourly rate discounted from standard rate structure.

**Training rates are provided at a daily rate for up to 15 participants, and vary depending upon the class. Training materials are not included in the daily rate. See Attachment B for details.

2. Describe how your services are priced and any specific pricing

Our consulting rates are based upon a price per hour, with a discounted rate provided for this RFP and any resulting contract. Solarity consulting contracts and statements of work are based upon time and materials.

3. Define any additional charges. (e.g. travel expenses)

Engagement related expenses

Travel expenses are not applicable for any work performed by resources with their home based within 35 miles of Fayette County. Travel expenses may apply for work performed outside of Fayette County. To review travel expense rates for work performed outside of Fayette County, please see the Cost of Services section.

Expenses that do occur will be billed together with the deliverables by Solarity at exact cost. These may include, but are not limited to travel, airfare, lodging, meals, car rental, required supplies and IRS approved mileage (\$0.56/mile) Current IRS approved mileage rates may be found at: <http://www.irs.gov/2014-Standard-Mileage-Rates-for-Business,-Medical-and-Moving-Announced>

Travel time will be billed at a rate of ½ the selected resources normally billable rate. For instance, if there are 2 hours of travel time, only 1 hour will be billed.

4. Provide a completed copy of Attachment B
Attachment B provided under separate tab.

Attachment A

Attachment A contains a list of the technologies used by the Lexington-Fayette Urban County Government. Please enter the average experience (years) of qualified employees who may provide IT services in the Experience column. You may enter the number of employees the average applies to, e.g. "5 years, 3 employees". The Comments column should be used to provide LFUCG with information that should be considered during the vendor selection process.

Technology	Experience	Comments
Microsoft Windows 2003, 2008, 2012, 2016		
Microsoft Windows 7, 8, 10 Desktop		
Microsoft Office 365, Architecture and Design	4 years, 4 subcontractors	Subcontractor: Composable Systems
Microsoft PowerShell	3 years, 5 subcontractors	Subcontractor: Composable Systems
Microsoft Active Directory		
Microsoft Exchange 2010, 2013		
AIX versions 5.x, 6.x, 7.x		
Linux		
Internet Information Server (IIS)	7 years, 9 subcontractors	Subcontractor: Composable Systems
F5 BigIP		
VMware		
VMware VirtualCenter		
VMware ESX		
Microsoft Access	10 years, 7 subcontractors	Subcontractor: Composable Systems
Microsoft SQL Server 2008, 2012, 2014, 2016	6 years, 14 subcontractors	Subcontractor: Composable Systems
Oracle Database 10, 11, 12, 13	4 years, 3 subcontractors	Subcontractor: Composable Systems
SharePoint Services (on premise and cloud)	7 years, 5 subcontractors	Subcontractor: Composable Systems
Microsoft Office SharePoint Server	9 years, 4 subcontractors	Subcontractor: Composable Systems
Microsoft .NET Framework 2+	5 years, 14 subcontractors	Subcontractor: Composable Systems
Microsoft Project Server	12 years, 1 employee + subcontractor	Selected by Microsoft as MVP Subcontractor is Microsoft PPM Partner
ESRI Geodatabase (10.2.1 and higher)		
ESRI ArcGIS for Server (10.2.1 and higher)		
ESRI ArcGIS for Desktop (10.2.1 and higher)		
ESRI ArcGIS Online (10.2.1 and higher)		
ESRI ArcReader (10.2.1 and higher)		

Visual Studio	7 years, 14 subcontractors	Subcontractor: Composable Systems
VBA	9 years, 7	Subcontractor: Composable Systems
Python	2 years, 3 subcontractors	Subcontractor: Composable Systems
JavaScript	6 years, 14 subcontractors	Subcontractor: Composable Systems
HTML5	2 years, 14 subcontractors	Subcontractor: Composable Systems
C#	6 years, 14 subcontractors	Subcontractor: Composable Systems
C++	3 years, 6 subcontractors	Subcontractor: Composable Systems
Ruby		
Ruby on Rails	1 year, 2 subcontractors	Subcontractor: Composable Systems
Visual Basic 6.0	3 years, 6 subcontractors	Subcontractor: Composable Systems
Technology	Experience	Comments
ASP.NET	6 years, 14 subcontractors	Subcontractor: Composable Systems
VB.NET	4 years, 7 subcontractors	Subcontractor: Composable Systems
jQuery	3 years, 13 subcontractors	Subcontractor: Composable Systems
Web Services	5 years, 14 subcontractors	Subcontractor: Composable Systems
PHP Development	2 years, 4 subcontractors	Subcontractor: Composable Systems
RPG IV		
BCD Presto		
ADO	5 years, 11 subcontractors	Subcontractor: Composable Systems
Moodle		
AJAX	3 years, 13 subcontractors	Subcontractor: Composable Systems
Technology	Experience	Comments
Node.js	1 years, 3 subcontractors	Subcontractor: Composable Systems
Chef, Puppet, Troposphere		

Amazon Web Services (AWS) Architecture	1 years, 2 subcontractors	Subcontractor: Composable Systems
Amazon Web Services (AWS) DevOps	1 years, 2 subcontractors	Subcontractor: Composable Systems
Microsoft Azure Architecture	2 years, 6 Subcontractors	Subcontractor: Composable Systems
Microsoft Azure DevOps	2 years, 6	Subcontractor: Composable Systems
Palo Alto Firewalls		
Splunk		
Switching & Routing		
Vulnerability Scanning (Nessus)		
Patch Management		
IBM BigFix		
PeopleSoft HCM 9.0		
PeopleSoft FSCM 8.9		
PeopleTools 8.49		

Attachment B

Attachment B contains a list of services the Lexington-Fayette Urban County Government may need provided. Please use the notes column to identify any information that should be considered during the vendor selection process. Exceptions to billing should be included in the notes, e.g. weekend rate adjustments.

Service		Rate	Notes
Software Development	ASP.NET C# JavaScript Ruby Ruby on Rails C++ HTML5 VB.NET Python Visual Basic 6.0 ESRI ArcGIS ADO 2.X + Web Services Microsoft Access	\$175	All software development work may be done for the same rate.
Database Design	SQL Server SQL Server Express MySQL ESRI Enterprise Geodatabase Oracle	\$175	All software development work may be done for the same rate.
Consulting	Disaster Recovery/Bus Continuity Technical Requirements Gathering IT Strategic Planning IT Governance IT Project Management IT Project Coordinator Certified Project Management (PMP) Network Technologies Software Development PeopleSoft HCM (9.0) PeopleSoft FSCM (8.9) Organizational Change Management	N/A \$156 \$178 \$178 \$156 \$156 \$156 N/A TBD N/A N/A \$156	Consulting rates vary based upon required resource experience and certification level.

Server Application Implementation	Microsoft SharePoint Microsoft Project Server Microsoft SQL Server Microsoft Exchange Microsoft Windows VMware Virtual Center VMware ESX ESRI ArcGIS Server	\$175	All software development work may be done for the same rate.
Service		Rate	Notes
Training	Microsoft SharePoint Microsoft Project Server Microsoft SQL Server Visual Studio Team Suite Visual Studio 2008 VMware Project Management PMP Certification IT Service Management Business Analysis Organizational Change Management	N/A \$3,000 N/A N/A N/A N/A \$2,500 \$3,500 \$2,500 \$4,500 \$3,500	Rate based on a price/day of training for up to 15 participants. Class durations vary by topic, and cost of materials is not included. Materials cost also vary by class. Discounted enrollment rates for public classes will be available to LFUCG staff.
Network Support	F5 BigIP Microsoft Active Directory Microsoft Windows VMware		
Information Security	Policy Development and Review Planning and Analysis Penetration Testing Vulnerability Testing Risk Management Assessment Info Security Audit and Compliance Info Security Remediation Info Security End-User Training		
Enterprise DevOps & "Cloud"	Cloud Architecture and Design Code Deployment and Maintenance Enterprise System Administration Version Control Infrastructure as Code (IaC) Platform as a Service (Paas) Software as a Service (SaaS) Infrastructure as a Service (IaaS)		