



**Exhibit to Managed Application Services  
Service Component Provider  
Master Services Agreement**

**DIR Contract No. DIR-MAS-SCP-RCR-001**

---

Between

**The State of Texas, acting by and through  
the Texas Department of Information Resources**

*and*

**Allied Consultants, Inc.**

**Exhibit 8**

**Technical Solutions**

**January 30, 2017**

# About this Document

## Introduction

In accordance with **Section 4.1** of the Agreement, this **Exhibit 8** describes the Service Provider's technical solution and overall approach to providing the Services. These descriptions should contain sufficient detail for technical staff to understand the overall approach, key changes, and timeframes associated with the solution. These descriptions address processes, procedures, management controls and other factors of the overall solution being provided.

Service Provider shall maintain and implement the solution; any modifications to the technical solution and overall approach shall be subject to DIR's review and approval in accordance with **Section 4.1** of the Agreement.

The provisions of this **Exhibit 8** are in addition to, and not in lieu of, the terms and conditions contained in the body of the Agreement and the other Exhibits and Attachments thereto; provided however, unless otherwise expressly stated, the provisions shall not control over conflicting provisions of the Agreement. Unless otherwise expressly defined in this **Exhibit 8**, capitalized terms shall have the meaning assigned to them elsewhere in the Agreement.

## 1. TECHNICAL SOLUTIONS

### 1.1 Technical Solution Summary

Service Provider shall maintain a formal process to receive and respond to Requests for Service Proposals (Solution Requests) from STC Customers. Each Solution Request shall be assessed according to the type of resource or resources required and the application and technical environment of the customer, with the expectation that most or all of the work will be performed at the STC customer locations in their existing DCS development and production environments. When requested by the customer, Service Provider shall also allow for the provisioned technical resource work to be performed at Service Provider's application development site, which shall be configured to match the STC customer's environment. For all types of requests, Service Provider shall use technical resources from Service Provider's Austin-based team or network of consultants located in Texas.

Service Provider shall structure a technology solution specific to each request (as opposed to a universal technology solution for Rate Card Resources) enabling Service Providers staff to satisfy all the STC customer requirements.

Service Provider's approach to delivering technical services shall be to first develop a clear and comprehensive understanding of the requested services, the application requirements, and the technical environment. Service Provider shall ensure that the most qualified professional staff whose skills, experience, training, and knowledge of project management and software development are consistent with the customer request are dedicated to the solution.

Service Provider has developed its own methodology for application development service delivery and shall use its custom, integrated methodology for contract management, project management, and software development. Influences on Service Provider's integrated methodology include PMI, CMMI, Unified Process, Agile Development, and the Texas Project Delivery Framework. Service Provider's practice shall be to further tailor its methodology to meet the unique needs and constraints of specific projects and clients in order to assure that Service Provider shall employ a development approach based on industry-

accepted guidelines and the client's specific needs, and one that Service Provider's technical workers know how to utilize in their development work.

Service Provider shall ensure that its technical team remains current in the technologies of the STC customers through the following programs:

- Education and training in current and emerging technologies;
- Continuing education necessary for technical workers to maintain certifications in their respective technical disciplines;
- Internal user group meetings to share best practices, lessons learned, and a forum for problem solving; and,
- Local and national technology user group meetings and conferences.

From a day-to-day operational perspective, Service provider's approach to the delivery of provisioned technical resources shall follow these steps:

1. **Review the STC customer's Solution Request.** Service Provider's engagement manager, business development manager, and application architect shall review the request, obtain any necessary clarification, confirm the solution requirements and initiate the sourcing of potential candidates.
2. **Review the STC customer's application and technology architecture.** Service Provider's engagement manager, business development manager and application architect shall review the application and identify the programming language(s), database, peripheral software tools and utilities, operating environment, and technology platform. This information shall be incorporated into a matrix used for candidate profiling.
3. **Create a matrix of the required application and technology architecture skills required.** Service Provider's business development manager and recruiting team lead shall create a brief narrative description of the STC customer's operation and the software applications function, as well as a matrix that lists all the required development language and technology architecture requirements.
4. **Map Service Provider technical workers' experience to the matrix to identify exact matches.** Service Provider's recruiting team lead and recruiters shall conduct searches for technical workers who match the profiles established in the matrix.
5. **Prepare a proposal to deliver services.** Service Provider's business development manager shall prepare the necessary response for the STC customer. The response shall include the candidate's resume (or candidates' resumes) and a matrix that demonstrates the staff qualifications consistent with the stated requirements.

## 1.2 Transition Plan

This section contains a description the Service Provider's approach to take on the responsibilities for the services described in **Exhibit 2.7.3**.

### 1.2.1 Approach

Service Provider will take a checklist approach to the transition plan, blending the STC participant's business objectives and requirements with the Application Managed Service (AMS) provider's Software Development Life Cycle (SDLC) methodology and the MSI ITIL requirements for sustainable operations.

The checklist shall encompass the key activities, resources, method of transfer, and estimated activity duration needed to enable success.

### **1.2.2 Transition Checklist**

The following table outlines the known activities, resource requirements, possible methods of transfer, and estimated duration for staff augmentation transition services. This checklist will require adjustment depending on the size, scope, and duration of the staff augmentation engagement. This checklist shall be used to guide operational support transition plan services, project assessment, or planning efforts for an application service enhancement, upgrade, modification, or new implementation.

<b>Activity</b>	<b>STC Resource</b>	<b>Service Provider Resource</b>	<b>MSI and/or AMS Resource(s)</b>	<b>Method of Transfer</b>	<b>Est. Duration (Business Days)</b>
Confirm scope/ requirements and review/finalize checklist	<ul style="list-style-type: none"> <li>• Contract and/or project manager</li> <li>• Subject matter expert</li> <li>• Business owner/sponsor</li> </ul>	<ul style="list-style-type: none"> <li>• Engagement executive</li> <li>• Project manager</li> <li>• Functional lead</li> <li>• Technical lead</li> </ul>	<ul style="list-style-type: none"> <li>• Engagement executive</li> <li>• Project manager</li> <li>• Functional lead</li> <li>• Technical lead</li> </ul>	<ul style="list-style-type: none"> <li>• E-mail</li> <li>• Conference call</li> <li>• Meeting</li> <li>• Word document</li> </ul>	2
Functional design documents	<ul style="list-style-type: none"> <li>• Contract and/or project manager</li> <li>• Subject matter expert</li> </ul>	Functional Lead	Functional Lead	E-mail, shared server, SharePoint location and/or URL	5 to 10
Technical design documents	Subject matter expert	<ul style="list-style-type: none"> <li>• Functional lead</li> <li>• Technical lead</li> </ul>	<ul style="list-style-type: none"> <li>• Functional lead</li> <li>• Technical lead</li> </ul>	E-mail, shared server, SharePoint location and/or URL	5 to 10
Configuration management plan and configuration items documentation	Subject matter expert	<ul style="list-style-type: none"> <li>• Functional lead</li> <li>• Technical lead</li> </ul>	<ul style="list-style-type: none"> <li>• Functional lead</li> <li>• Technical lead</li> </ul>	E-mail, shared server, SharePoint location and/or URL Review meetings	5 to 10
Job schedule (batch programs, interfaces, reports) documentation	Subject Matter Expert	<ul style="list-style-type: none"> <li>• Functional lead</li> <li>• Technical lead</li> </ul>	<ul style="list-style-type: none"> <li>• Functional lead</li> <li>• Technical lead</li> </ul>	E-mail, shared server, SharePoint location and/or URL Review meetings	5 to 10

<b>Activity</b>	<b>STC Resource</b>	<b>Service Provider Resource</b>	<b>MSI and/or AMS Resource(s)</b>	<b>Method of Transfer</b>	<b>Est. Duration (Business Days)</b>
Existing annual maintenance and enhancement plan	<ul style="list-style-type: none"> <li>• Contract manager</li> <li>• Project manager</li> <li>• Subject matter expert</li> <li>• Business owner/sponsor</li> </ul>	<ul style="list-style-type: none"> <li>• Engagement executive</li> <li>• Project manager</li> <li>• Functional lead</li> <li>• Technical lead</li> </ul>	<ul style="list-style-type: none"> <li>• Engagement executive</li> <li>• Project manager</li> <li>• Functional lead</li> <li>• Technical lead</li> </ul>	E-mail, shared server, SharePoint location and/or URL Review meetings	2
Ticketing system feature/function/ open items walk-through	<ul style="list-style-type: none"> <li>• Contract manager</li> <li>• Project manager</li> </ul>	<ul style="list-style-type: none"> <li>• Functional lead</li> <li>• Technical lead</li> <li>• Project manager</li> </ul>	<ul style="list-style-type: none"> <li>• Functional lead</li> <li>• Technical lead</li> <li>• Project manager</li> </ul>	E-mail, shared server, SharePoint location and/or URL Review meetings	2

## **1.3 Other Solution Components**

### **1.3.1 Tools, Process and Methodologies**

Service Provider shall utilize the tools, process and methodologies outlined in Exhibit 2.1.2, which are provided by DIR's Multi-sourcing Service Integrator.

Service Provider shall tailor its processes to optimize its response to the specific requirements of each DIR customer engagement. Because of the broad range of engagements possible under the proposed agreement, the processes Service Provider utilizes shall include those in place for the organization for which Service Provider provides staffing services to implementation of ITIL-compliant processes for those engagements that Service Provider leads.

### **1.3.2 Technology Architecture and Standards**

Service Provider anticipates that for most engagements, the Service Provider will support existing technical architectures and standards of the STC customers. When required, Service Provider shall use experienced personnel to support current environments and as needed enlist skilled technical architects to assist DCS customers, other DCS service providers, and third-party vendors in moving DIR clients to new environments. In leading projects, Service Provider shall take the following steps as part of the planning process:

1. Document and agree upon the client's specific requirements for the future state in a System Requirements Specification.
2. Assess the current state of the client's environment.
3. Determine and document the steps necessary to move the client from the current state to the future state while assuring the current environment is not affected.
4. Obtain client approval for the necessary changes to the current environment.
5. Implement the changes as documented.
6. Service Provider shall use ITIL-compliant processes to develop the technical architecture and use SDLC management techniques to implement client requirements.

### **1.3.3 People Skills and Training**

This section contains a description of the Service Provider's staffing model, skills profile and how the Service Provider will provision these skills. The Service Provider will describe its approach to training its delivery organization and any interfacing organizations (e.g. DCS Customers, and other Third Party Vendors including DCS Service Providers) to ensure the successful delivery of Services. In addition, the Service Provider will describe its method for assessing the staffing levels against actual workload, and what capabilities it has to increase staff to meet the workload variations and demands.

#### **1.3.3.1 Staffing**

Service Provider shall maintain a staffing model centered on domain and industry knowledge. Service Provider shall align its resources based around the client, Service Provider's business knowledge, and industry best practices, and then engage the required technical expertise. As part of the process of

reaching an agreement for services with an STC customer, DCS service provider, or other third-party vendor, Service Provider shall assess the skills necessary to provide the services requested and match Service Provider's resources to those required skills.

Service Provider shall provide the entire range of skills required, whether it is for one person to augment the staff of an interfacing organization or a team of resources to lead and staff a major initiative for a DCS customer.

For projects Service Provider leads, Service Provider shall use the following approach:

1. Create an onboarding guide for all team members, using any relevant client information to expedite the process. The purpose of this guide is to minimize the orientation period of new team members, and it includes a list of the project team members, organization chart, network details, review cycles, sign-off procedures, and the client's business culture and expectations.
2. Create standards and standard operating procedures (SOP) documents identifying templates that will be used on the project to manage the performance of tasks.
3. Identify State agency business processes and roles.
4. Document agency business process flows with "swim lanes" (listing roles).
5. Identify inputs and outputs related to each specific business process.
6. Identify the factors for evaluating the success of an individual in accomplishing a task correctly and within the appropriate timeframe.
7. Create a self-study course related to processes and procedures, using the third-party vendor's training materials if available (depending on the complexity of the subject and the number of individuals requiring training, the self-study or self-directed course can be used in an instructor-led training session to train team members).
8. Customize the third-party vendor's materials to accommodate the client's business processes and activities.
9. Provide opportunities for new team members to shadow a current team member in order to accelerate any learning curve related to the client environment, business processes and applications.

### **1.3.3.2 Training Approach**

Service Provider shall use a variety of approaches to develop consultants within Service Provider's organization, with most training and development occurring informally within its organization. This informal training may include formal and informal mentoring, peer shadowing, special or "stretch" assignments, and local professional organization memberships and meetings. Service Provider shall regularly send consultants with COTS software expertise or development needs to user conferences or industry user group meetings. Service Provider shall also provide formal training, which may include formal classes through software vendors, college or university programs, or other registered training providers (e.g. Project Management Institute Project Management Professionals).

When new staff are joining an existing project that Service Provider manages, Service Provider shall use the following approach:

1. Prior to onboarding new team members, an identified individual communicates the arrival of the new team member(s), completes the necessary paperwork requesting identification (i.e. badge), a workstation, and equipment to ensure that these will be available the first day the new member begins work.
2. The team lead or appointed mentor introduces new resources to other team members and conducts a tour of the site and makes the appropriate introductions. In addition, the appointed



- mentor provides the team onboarding guide to answer common questions and obtain an understanding of the project, the client, and other relevant information.
3. The new team member may shadow the mentor for a specific period of time to ask questions and to ensure understanding of project expectations.
  4. Through self-study and/or instructor-led training, team members learn about the third party COTS product that will be utilized as well as learn and understand roles, responsibilities, and business processes specific to the State.
  5. Additional resources (i.e. those individuals joining the team to accommodate for peak period or to replace team members) may learn through self-study and the assistance of a mentor.
  6. All teams meet regularly as a team to report on status; individual team members provide a weekly status to the team lead and the team lead may provide coaching to individuals who need assistance.

Because each organization has different training needs and responds better to specific training methods, Service Provider shall routinely use several different approaches to training for interfacing providers and their delivery organizations. Beginning with discussions with the interfacing provider and delivery organization to best understand the population, Service Provider shall work together to develop and deliver a training plan that best meets the needs of the delivery organization. The types of training Service Provider provides includes classroom based, user training guides, train-the-trainer classes, webinars/WebEx, and on-demand e-Learnings. Service Provider may also develop learning and job aids based on the needs of the delivery organization to complement the training.

Upon the completion of a project, all project documentation created by Service Provider team members shall be transferred to the client. In addition, the appropriate Service Provider team members shall meet with the client to discuss important project and application details and provide documentation that facilitates the transfer of responsibilities and knowledge.

### **1.3.3.3 Method for Assessing Staffing Levels**

Service Provider shall work with Service Provider's consultants on a continual basis to evaluate hard and soft skill profiles against known and projected client needs or anticipated opportunities.

Service Provider shall plan staffing needs for each existing contract and, as part of that plan, project the needs for potential future contracts. Service Provider shall reevaluate and perform significant adjustments to the staffing and delivery plan quarterly based on the needs of the market, clients, and consultants. As Service Provider monitors staffing levels, Service Provider may make minor adjustments based on and changes to requirements or new projects. Service Provider shall maintain a bench strength of skilled functional analysts, technical architects, and project managers who are available to respond to changing needs of service delivery organizations, customers and/or related market needs.

### **1.3.4 Governance Interfaces**

Service Provider has participated in activities associated with the DCS Owner-Operator Governance model employed by DIR with its STC customers and MSI. The owner-operator model puts the decision making and solution ownership with those individuals closest to day-to-day operations. This leads to efficiency by having decision making where there is the most functional and technical expertise.

The owner-operator model shall focus on the best interest of the whole. The benefits of this approach include the following:

- **Better decisions.** By including the input of all stakeholders, the resulting proposals can best address all potential concerns.
- **Better implementation.** A process that includes and respects all parties and generates as much agreement as possible sets the stage for greater cooperation in implementing the resulting decisions.
- **Better group relationships.** A cooperative, collaborative group atmosphere fosters greater group cohesion and interpersonal connection.

This model converges organizational goals, objectives, and working leadership with the expertise in the functional and technical application areas. Understanding this connection is critical in demonstrating the importance of every role in the governance team in order to ensure success.

Governance is a critical success factor because it helps to effectively and efficiently adapt applications and technology to the changing needs of organizations and determines allocation of resources necessary to achieve desired results. Governance establishes a basic framework: it creates the operational framework to manage change, assess performance against a set of best practices, and track progress over time. The ability to manage and measure work through governance is critical to short-term and long-term success.

Another critical success factor is to have a shared understanding of the governance model as it establishes the framework in which all entities or parties must operate. The owner-operator based consensus model is meant to provide that shared understanding and framework through conveying committee structure, RACI matrices, participation, and defined and repeatable processes.

The governance model sets the framework for short-term and long-term planning, service delivery plan development and execution, status, risk, issue, and change management. This is important for providing team members at all levels one shared process to use, critical to achieving the goals, developing and managing performance metrics, performing issue resolution, risk mitigation, change management, and escalations. Finally, this approach sets the framework for communication. Allied shares DIR's conviction that dissemination of accurate and timely information is crucial to effective governance and operations.

To support the owner-operator/consensus based governance model, Service Provider shall align its leadership team to support the model articulated and detailed in Exhibit 6.

Service Provider shall participate in these meetings and groups as called upon, required and/or based on the agenda. Service Provider shall provide a support role to enable solutions, identify and discuss technical options for solving issues, and participate in collaborative solution development from the technical and business perspective.

Service Provider resources aligned with this process shall be in leadership positions empowered to speak and make commitments on behalf of Service Provider.

Service Provider leadership aligned in support of the governance process shall proactively coordinate the appropriate depth and breadth of resources and expertise within the organization to provide review of materials and to participate in decision making and governance. This may include, but is not limited to, agenda and material review, submission of position papers or white papers, meeting preparatory activities, and remote participation.

Service Provider shall ensure that the right resource with the right skills and expertise are aligned with each Agency Partner and the MSI.

Service Provider shall evaluate its current Account Management and Support Model structure to ensure alignment with the agency partner groups and to enable continuity of team members, communication, business prioritization, resource planning, and services delivery management.

### 1.3.5 Process Documentation and Compliance

The process documentation and compliance approaches for Service Provider shall ensure that the changes and maintenance activities Service Provider is engaged to perform are clearly identified, defined, and documented. The changes and maintenance activities can then be prioritized, agreed upon, and sequenced to appropriate work streams and resources. This enables Service Provider to effectively manage and measure the maintenance processes.

Service Provider shall use a combination of the SDLC and ITIL as the methodology to manage the changes and/or maintenance activities.

Service Provider shall prepare a Service Management Manual as defined in Attachment 6-B. In addition, Service Provider shall leverage existing DIR, MSI, and Service Provider-Managed Application Services manuals as a basis to align formats, content, processes, and procedures.

The manual, its development, monitoring and updating will be coordinated by the Service Provider Application Architect and Project Manager role following the schedule outlined in Attachment 6-B and described in the table below.

Requirement	Milestone Date	Content
Delivery 1	14 days after contract effective date	<ul style="list-style-type: none"> <li>• 2.2 Organizational Overview               <ul style="list-style-type: none"> <li>▪ Service Provider Management and Delivery Organization</li> <li>▪ Key Contacts – Third Parties</li> </ul> </li> <li>• 2.5 Contract Management Procedures               <ul style="list-style-type: none"> <li>▪ Service Provider Key Personnel and Subcontractors</li> </ul> </li> <li>• 2.7 Service Provider Operational Procedures               <ul style="list-style-type: none"> <li>▪ Managed Application Services Operational Procedures – Rate Card Resources – Outline</li> </ul> </li> </ul>
Delivery 2	90 days after first solution order signed with STC customer	<ul style="list-style-type: none"> <li>• 2.1 Purpose</li> <li>• 2.3 IT Service Management Procedures</li> <li>• 2.4 Financial Management Procedures</li> <li>• 2.5 Contract Management Procedures</li> <li>• 2.6 Relationship Management Procedures</li> <li>• 2.7 Service Provider Operational Procedures               <ul style="list-style-type: none"> <li>▪ Managed Application Services Operational Procedures - Rate Card Resources – Functions, Policies and Procedures</li> </ul> </li> <li>• 2.8 STC customer Operations Manual               <ul style="list-style-type: none"> <li>▪ Rate Card Resources – Functions, Policies, Procedures</li> </ul> </li> </ul>

Requirement	Milestone Date	Content
Delivery 3	180 days after first solution order signed with STC customer	<ul style="list-style-type: none"> <li>• 2.7 Service Provider Operational Procedures <ul style="list-style-type: none"> <li>▪ Managed Application Services Operational Procedures – Rate Card Resources – Work Instructions</li> </ul> </li> <li>• 2.8 STC customer Operations Manual <ul style="list-style-type: none"> <li>▪ Rate Card Resources – Work Instructions</li> </ul> </li> </ul>

**Assumptions**

1. Service Provider shall perform a review and update of the manual each biennium at a minimum.
2. Service Provider shall perform a review and update of the manual each time a new STC Customer is added or existing customer is updated.
3. Service Provider shall perform a review and update of the manual each time the MSI and/or Service Component Provider provides an update to the manual.
4. Service Provider expects the MSI and/or Service Provider will have designated application architect/project managers available, technical architecture and/or relationship management resources available for information sharing, coordination and content consistency.
5. DIR will ensure the most recent policies, procedures, auditing and related requirements are available on the website.

**1.3.6 Chargeback Management**

The purpose of chargeback management shall be to provide timely, seamless, and transparent charges and cost allocations for services. Service Provider shall work with the existing MSI and SCP to ensure these activities are established, coordinated, performed in a timely manner, are accurate for reporting and billing, and seamless to DIR and STCs.

The following sections outline Service Provider’s understanding of the Chargeback Management requirements. Service Provider recognizes that there are components of these requirements and responsibilities that Service Provider shall be responsible for accomplishing and that there are components of these requirements and responsibilities for which the Service Provider shall work with the MSI to accomplish. Service Provider shall ensure that these activities are consistently done in an efficient, timely, and coordinated manner.

**1.3.6.1 Service Provider Responsibilities**

1. Service Provider shall utilize the Chargeback and Utilization Tracking System provided by the MSI such that it serves as the single source of information regarding all IT financial information for services within Service Provider scope.
2. Service Provider shall integrate the Chargeback System with other systems for Service Management, including but not limited to Service Level Management, Capacity Management (CMIS), and Configuration Management (CMS/CMCB).
3. Service Provider shall integrate the MSI Chargeback System with Service Providers’ other systems; including all appropriate and required licenses and/or interfaces.

4. Service Provider shall provide sufficient detail to support DIR and STC customers State and Federal funding, accounting, grant, and audit requirements.
5. Service Provider shall collect and aggregate billing, service provisioning, and service metric information from Service Provider Services.
6. Service Provider shall identify unique STC customer account identifiers to identify applications and other services information.

#### **1.3.6.2 Chargeback and Utilization Reporting**

1. Service Provider shall support all charges with detailed invoice reports in Attachment 4-F and support utilization data as described in Attachment 13-A at the STC customer, resource unit, cost category, and resource unit ID level.
2. STC customers will identify unique Resource Unit IDs and provide cost category mapping through the self-service portal.
3. Chargeback Service Provider billing will apply all portal changes to accounting information during the invoice period.

#### **1.3.6.3 Chargeback Invoice Consolidation**

1. Service Provider shall provide the MSI with a single monthly enterprise invoice for Service Provider Services and designated Third-Party Vendors.
2. Service Provider shall provide the MSI a single monthly chargeback invoice for each STC customer for Service Provider Services and designated Third-Party Services.

#### **1.3.6.4 Invoice Dispute Processing**

1. Service Provider shall actively participate in developing and maintaining the processes for the resolution of invoice disputes within designated timeframes.
2. Service Provider shall provide effective and agreed mechanisms for crediting DIR and STC customers as appropriate.
3. Service Provider shall effectively execute the processes to record, track and manage incidents of invoice disputes.
4. Service Provider shall research and review invoice disputes for completeness and supporting data accuracy and, when necessary, request clarifying data from DIR or STC customers.
5. Service Provider shall support and initiate additional treatment of invoice disputes to facilitate resolution within designated timeframes.
6. Service Provider shall ensure that incidents of invoice disputes are continually updated, at minimum on a weekly basis.
7. Service Provider shall keep the MSI informed of activity and anticipated resolution times for active incidents of invoice disputes.
8. Service Provider shall allow DIR to monitor and validate invoice dispute process on an ongoing basis.
9. Service Provider shall provide a process for escalating to Service Provider management incidents of invoice disputes not resolved within the time frames established within DIR policies.

### 1.3.7 Optional Requirements and Features

Service Provider offers the following complimentary services:

1. **Dedicated MAS Rate Card Resources Account Manager** - Service Provider will provide a dedicated MAS Rate Card Resources Account Manager
2. **Application Architecture Services** - Service Provider's Application Architecture group will include experienced project management and application architecture consultants. These resources will be available to any MAS customer to perform the following services:
  - a. Review an agency's application development requirements
  - b. Identify the types of application skills required
  - c. Determine the number of resources needed
  - d. Assist in the development of work order or statement of work for these resources
  - e. Provide ongoing consulting services
  - f. These services are part of Service Provider's offering under this category.
3. **Fixed Price and Hours Offering** – Service Provider will develop a price offering that enables the agency to receive assurance that the provisional services they receive will be at a set cost and for a guaranteed number of hours. Service Provider shall work with the agency to create a well-defined requirements document and statement of work and negotiate a fixed price based on the rates defined in **Attachment 4-A**.
4. **Legacy System Support Team** – Service Provider will maintain available resources to support any MAS customer's legacy applications, whether personal computer, client server, or mainframe based.
5. **Agency Best Practices** – Service Provider will identify and employ best practices, approaches and technology that may be beneficial to MAS customers including, but not limited to:
  - a. **PeopleSoft CAPPs** – Knowledge and expertise necessary to help all MAS customers by providing planning, implementation, training, data conversion, and change management services.
  - b. **Data Management** – Conducting data management, assessment, profiling, and cleansing activities as an independent initiative immediately before the development of new applications thereby enabling clients to dedicate the necessary time studying their legacy data rather than converting data as is.
  - c. **Refactoring Applications** – Making use of automated tools to convert legacy code and create new programs in current technologies such as Java. Refactoring utilizes business processes and logic that work today as the basis for creating new code, thereby extending the life of legacy applications.
  - d. **Grants Management** – Experience working on custom and commercially developed grant applications and thus providing a unique understanding of the requirements for state, federal, and locally funded programs and the methods to configure and construct applications to meet the needs of Texas government clients.
6. **System Modernization** – Service Provider has experience with several large modernization efforts and has provided a methodology, approach, and services associated with this activity. Typically these services are divided into the following tasks:
  - a. **Assessment** – A planning task that identifies sources of data and legacy systems.

- b. **Profiling** – The analysis and evaluation of data across all data sources to identify and highlight anomalies, expose data quality exceptions, and data and business rule conflicts.
- c. **Cleansing** – The creation of business rules and programs that will cleanse legacy data or convert it into the new system data formats.
- d. **Data Staging** – Creation of a database that contains all the data in the format required by the new system. This data is updated regularly and can be used by the legacy application as well as the new system, thus providing a two-fold benefit to the agency.