

| <p style="text-align: center;">Liona Enterprises, Inc.</p> <p style="text-align: center;">DIR-CPO-TMP-593 Deliverables Based Information Technology Services (DBITS)</p> <p style="text-align: center;">APPENDIX C – Awarded Categories</p> <p style="text-align: center;">DIR-CPO-5939</p> | |
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| Category RFO Reference | Category Title / and Category Description |
| 2.2.1 | <p>Application Development, Maintenance, and Support, Technology Upgrade, Migration, and Transformation; and Enterprise Resource Planning (ERP)</p> <p>A. Application Development is the development of new applications which may be mainframe, server, network-based, web-based or a combination and may require interfaces to existing applications. Application Maintenance and Support includes troubleshooting, modifying, maintaining, improving security, and enhancing legacy systems and applications which may be running in a production environment.</p> <p>B. Technology upgrade, migration, and transformation may be accomplished by converting/migrating legacy applications to new technology, either with or without new business functionality. It may also include introducing new technology into the enterprise and managing any changes as a result of the introduction.</p> <p>C. Transformation may include assessments of the current application portfolio, evaluation of the technology assets before beginning technology transformation and Business Case development for justification of an initiative. Part of the transformation journey may include planning, analysis, requirements development, proof of concept, deployment, implementation, integration, remediation, data migration, documentation, application programming and support services, and training support.</p> <p>D. Return on investment (ROI), benchmarks, and milestones may also be appropriate to include in a transformation initiative.</p> <p>E. Agile methodology may be considered if requesting agency approves the deliverables and /or milestones that align with the documented sprint schedule, methodology, and governance which defines the process of developing, communicating, implementing, monitoring, and approving the project phases.</p> <p>F. ERP is an amalgamation of an organization’s information systems designed to automate and integrate a variety of functions, commonly referred to as “back office”, including financials, human resources and asset management. These systems are usually modularized and generally highly configurable. Business Process Reengineering (BPR), system or application changes, implementation, conversion services, and training are often included in an ERP initiative.</p> |
| 2.2.2 | <p>Business Intelligence (BI), Data Management, Analytics, and Automation, including Data Warehousing.</p> <p>A. BI enables an organization to perform in-depth analysis and includes, where required, data mining of detailed business data providing real and significant information to business users. BI may include an integrated group of operational and decision support applications and databases. BI makes use of tools designed to easily access data warehouse data. A data warehouse collects, organizes and makes data available for the purpose of analysis and gives organizations the ability to access and analyze information about its business. The function of the data warehouse is to consolidate and reconcile information from across disparate business units and IT systems and provide a context for reporting and analysis.</p> <p>B. Road mapping for a data warehouse initiative may include assessment of technology and infrastructure, as-is documentation, business requirements gathering, use case development, and reporting requirements analysis.</p> |

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C. This category includes solutioning data warehouse architectural design, data warehouse processes and sourcing, extraction, transformation, analytics, and loading of data sources; planning, assessment, product installation and tuning; prototype development, deployment, data cleansing, data mart development and support; data migration, integration with data mining; integration with business intelligence tools, artificial intelligence, and/or systems; data scrubbing; data transformation; training and knowledge transfer.

D. Data governance planning and implementation, and Business Analytics and Reporting (BAR) are also included in this category.

2.2.3
IT Assessments, Planning, Independent Verification and Validation (IV&V), and Market Research, Procurement Advisory, and Contract Implementation Services.
This category includes, but is not limited to:

A. IT Assessments and Planning may include IT effectiveness, maturity, governance, and architecture. Strategic planning activities may include mission statement development, visioning and goals, objectives, and strategy development. Assessment of staff knowledge, skills and abilities, bandwidth, time and motion studies, and succession planning are included in this category. Strategic planning development and tactical planning may require the provision of actionable plans and roadmaps. Organization change management, enterprise architecture, cloud assessments, and network performance assessments are within scope as well.

B. Also included in this category are the independent verification and validation procedures that are used together for in-depth analysis of a product, service, or system for compliance with requirements as well as the independent oversight of software (or systems) development life cycle (SDLC) processes and specifications.

C. Market Research, Procurement Advisory, and Contract Implementation Services activities may include requirements gathering, facilitation activities, scoring criteria development, evaluation criteria development, negotiation guidance and assistance, and contract transition assistance.

- i) Cost optimization including software license cost analysis;
- ii) Financial planning and pricing structures;
- iii) Market reviews/market research;
- iv) Market engagement;
- v) Transition/implementation assistance; and
- vi) IT contract management assistance.

NOTE: When using Procurement Advisory Services under the Texas Government Code, § 2155.004, a state agency may not accept a bid or award a contract that includes proposed financial participation by a person who received compensation from the agency to participate in preparing the specifications or request for proposals on which the bid or contract is based. The selected Contract Holder and the employees of that Contract Holder who perform Procurement Advisory Services will be ineligible to respond to any resulting solicitation(s).

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2.2.4

Project and Program Management

A. Project and Program management services include any or all the project management processes identified by the Project Management Institute (PMI) as published in the most recent edition of the PMBOK® Guide, including practice guides such as Agile and Managing Change in Organizations.

B. Examples of included services include utilizing the Customer's tools and processes, using commercially available off-the-shelf tools, using Contract Holder's own proprietary tools and processes to manage a project, and using the Texas Project Delivery Framework. Information about the framework tool can be found at the following url:

<https://prod.dir.texas.gov/project-delivery-framework> (copy and paste not a link)

C. This category includes, but is not limited to:

- i) Business case development;
- ii) Statewide impact analysis;
- iii) Cost to benefit analysis;
- iv) Risk assessment;
- v) Stakeholder management;
- vi) Organizational change management;
- vii) Strategic planning;
- viii) Program assessment; and
- ix) Agile development, training, coaching.