



GMU-1700-21  
IT Consulting RFP Response  
Redacted  
Higher Digital Inc.



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## Executive Overview – Introduction

Founded in 2017 and with headquarters in Tysons Corner, Virginia, Higher Digital Inc. is a digital transformation management company, focused solely on the higher education industry, that provides consulting, software, and data benchmarking tools that increase success rates for an institutions' IT strategies and projects.

Higher Digital's current clients include industry leaders like Arizona State University, Southern New Hampshire University, University of Maryland – Global Campus, American University, the California Community College system, and University of Greenwich (UK).

Higher Digital's consulting expertise and services include Information Technology (IT) strategy, IT leadership, ERP/SIS transformation, staffing, accreditation, digital strategy, enterprise architecture, team optimization, change management, vendor/market analysis, product strategy, service delivery optimization, project/process training, user experience, and accessibility.

Higher Digital created an approach specifically for the higher education industry that leverages tools and processes an institution already has in place. We call this methodology, Simplified Enterprise Agile® (SEA), which is designed to accommodate any IT change initiative, regardless of size, complexity, or domain. Also known as (SEA)change, this methodology provides the process, training, and results your stakeholders need to drive necessary change: from the top down with a fresh strategy; bottom up with a new cloud infrastructure; in-between with operational system upgrades / migrations / replacements; or all of the above.

Higher Digital also offers an institutional assessment tool that helps an institution rapidly analyze and benchmark across a global network of peer institutions – delivering a data-driven understanding of its strengths and weaknesses. Higher Digital includes this tool as part of most short and long-term engagements. Global privacy and security standards are fully supported – meaning personal, institutional, and system-wide data will never be identifiable or shared with anyone.

Higher Digital blends higher education industry experience with IT leadership to offer George Mason a short- or long-term partner that can provide the necessary consulting staff and expertise for any major on-demand IT project or digital strategy initiative



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## REQUEST FOR PROPOSALS GMU-1700-21

**ISSUE DATE:** November 13, 2020

**TITLE:** IT Consulting Services

**PRIMARY PROCUREMENT OFFICER:** Michele Rogers, Senior Buyer, [mroger19@gmu.edu](mailto:mroger19@gmu.edu)

**SECONDARY PROCUREMENT OFFICER:** Katherine Sirotin, Assistant Director, [ksirotin@gmu.edu](mailto:ksirotin@gmu.edu)

**QUESTIONS/INQUIRIES:** E-mail all inquiries to both Procurement Officers listed above, no later than 4:00 PM EST on December 4, 2020. All questions must be submitted in writing. Responses to questions will be posted on the [Mason Purchasing Website](#) by 5:00 PM EST on December 10, 2020. Note: Questions must be submitted in WORD format. Also see section III. COMMUNICATION, herein.

**PROPOSAL DUE DATE AND TIME:** January 22, 2021 @ 2:00 PM EST. SEE SECTION XIII.A.1 FOR DETAILS ON ELECTRONIC PROPOSAL SUBMISSION.

**In Compliance With This Request For Proposal And To All The Conditions Imposed Therein And Hereby Incorporated By Reference, The Undersigned Offers And Agrees To Furnish The Goods/Services In Accordance With The Attached Signed Proposal Or As Mutually Agreed Upon By Subsequent Negotiations.**

Name and Address of Firm: Higher Digital Inc.

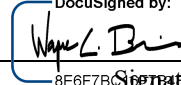
Legal Name: Higher Digital Inc.

Date: January 22, 2021

DBA: C-Corp

Address:

1775 Tysons Blvd – 5<sup>th</sup> Floor  
Tysons, VA 22102

DocuSigned by:  
By:   
8E6F7B0C Signature

FEI/FIN No. 86-1226010\_\_\_\_\_

Name: Wayne Bovier

Fax No. N/A

Title: CEO

Email: wayne@higher.digital

Telephone No. 1.833.344.4437

SWaM Certified: Yes: \_\_\_\_\_ No: X (See Section VII. SWaM CERTIFICATION for complete details).

SWaM Certification Number: \_\_\_\_\_

This public body does not discriminate against faith-based organizations in accordance with the *Governing Rules*, § 36 or against a Bidder/Offeror because of race, religion, color, sex, national origin, age, disability, or any other prohibited by state law relating to discrimination in employment.

**ATTACHMENT A**  
**SMALL BUSINESS SUBCONTRACTING PLAN**  
**TO BE COMPLETED BY OFFEROR**

It is the goal of the Commonwealth that over 42% of its purchases be made from small businesses. All potential offerors are required to include this document with their proposal in order to be considered responsive.

**Small Business:** "Small business (including micro)" means a business which holds a certification as such by the Virginia Department of Small Business and Supplier Diversity (DSBSD) on the due date and time for proposals. This shall also include DSBSD certified women- owned and minority-owned businesses and businesses with DSBSD service disabled veteran owned status when they also hold a DSBSD certification as a small business on the proposal due date. Currently, DSBSD offers small business certification and micro business designation to firms that qualify.

Certification applications are available through DSBSD online at [www.SBSD.virginia.gov](http://www.SBSD.virginia.gov) (Customer Service).

**Offeror Name:** Higher Digital, Inc.

**Preparer Name:** Paul Hyland **Date:** January 22, 2021

**Who will be doing the work:** ☐ I plan to use subcontractors ☒ I plan to complete all work

**Instructions**

- A. If you are certified by the DSBSD as a micro/small business, complete only Section A of this form.
- B. If you are not a DSBSD-certified small business, complete Section B of this form. For the proposal to be considered and the offeror to be declared responsive, the offeror shall identify the portions of the contract that will be subcontracted to DSBSD certified small business for the initial contract period in relation to the offeror's total price for the initial contract period in Section B.

**Section A**

If your firm is certified by the DSBSD provide your certification number and the date of certification.

Certification Number: \_\_\_\_\_ Certification Date: \_\_\_\_\_

**Section B**

If the "I plan to use subcontractors" box is checked, populate the requested information below, per subcontractor to show your firm's plans for utilization of DSBSD-certified small businesses in the performance of this contract for the initial contract period in relation to the offeror's total price for the initial contract period. Certified small businesses include but are not limited to DSBSD-certified women-owned and minority-owned businesses and businesses with DSBSD service disabled veteran-owned status that have also received the DSBSD small business certification. Include plans to utilize small businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc. It is important to note that these proposed participation will be incorporated into the subsequent contract and will be a requirement of the contract. Failure to obtain the proposed participation dollar value or percentages may result in breach of the contract.

**B. Plans for Utilization of DSBSD-Certified Small Businesses for this Procurement**

**Subcontract #1**

Company Name: \_\_\_\_\_ SBSD Cert #: \_\_\_\_\_  
 Contact Name: \_\_\_\_\_ SBSD Certification: \_\_\_\_\_  
 Contact Phone: \_\_\_\_\_ Contact Email: \_\_\_\_\_  
 Value % or \$ (Initial Term): \_\_\_\_\_ Contact Address: \_\_\_\_\_  
 Description of Work: \_\_\_\_\_

**Subcontract #2**

Company Name: \_\_\_\_\_ SBSD Cert #: \_\_\_\_\_  
 Contact Name: \_\_\_\_\_ SBSD Certification: \_\_\_\_\_  
 Contact Phone: \_\_\_\_\_ Contact Email: \_\_\_\_\_  
 Value % or \$ (Initial Term): \_\_\_\_\_ Contact Address: \_\_\_\_\_  
 Description of Work: \_\_\_\_\_

**Subcontract #3**

Company Name: \_\_\_\_\_ SBSD Cert #: \_\_\_\_\_  
Contact Name: \_\_\_\_\_ SBSD Certification: \_\_\_\_\_  
Contact Phone: \_\_\_\_\_ Contact Email: \_\_\_\_\_  
Value % or \$ (Initial Term): \_\_\_\_\_ Contact Address: \_\_\_\_\_  
Description of Work: \_\_\_\_\_

**Subcontract #4**

Company Name: \_\_\_\_\_ SBSD Cert #: \_\_\_\_\_  
Contact Name: \_\_\_\_\_ SBSD Certification: \_\_\_\_\_  
Contact Phone: \_\_\_\_\_ Contact Email: \_\_\_\_\_  
Value % or \$ (Initial Term): \_\_\_\_\_ Contact Address: \_\_\_\_\_  
Description of Work: \_\_\_\_\_

**Subcontract #5**

Company Name: \_\_\_\_\_ SBSD Cert #: \_\_\_\_\_  
Contact Name: \_\_\_\_\_ SBSD Certification: \_\_\_\_\_  
Contact Phone: \_\_\_\_\_ Contact Email: \_\_\_\_\_  
Value % or \$ (Initial Term): \_\_\_\_\_ Contact Address: \_\_\_\_\_  
Description of Work: \_\_\_\_\_



The remainder of the proposal will be organized according to Section XIII, subsection B – specific requirements. In our copy of the RFP text, we have included the correction highlighted in the Addendum Question 16, substituting “IT related support services and consulting” for both “trademark licensing services” and “licensees (retail and internal)”.

### **XIII. PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS:**

B. **SPECIFIC REQUIREMENTS:** Proposals should be as thorough and detailed as possible to allow Mason to properly evaluate the Offeror’s capabilities and approach toward providing the required services. Offerors are required to submit the following items as a complete proposal.

#### **1. Procedural information:**

a. Return signed cover page and all addenda, if any, signed and completed as required.

(See p. 4)

b. Return Attachment A - Small Business Subcontracting Plan.

(See pp. 5-6)

c. State your payment preference in your proposal response. (See section XVI; page 8)

Higher Digital would prefer to be paid via Option #3 – Net 30 Payment Terms, as described in Section XVI of the RFP.

d. It is Mason’s intent to use our Standard Two Party Contract as the award vehicle for this RFP (see Attachment B – Sample Contract). If your firm takes exception to this contract or would like to make redlines or have other documentation (such as MSA/SaaS/etc). incorporated into the final contract/agreement please provide those redlines and any other changes or requests to modify the contract or add additional documents at the time of proposal submission.

Higher Digital agrees to use the GMU Standard Two Party Contract.

2. References: No fewer than three (3), preferably from other comparable higher education institutions to which your firm is/has provided trademark licensing services IT related support services and consulting which are similar in size and scope to that which has been described herein, that demonstrate the offeror’s qualifications.

University of Maryland Global Campus (UMGC)  
Contact info: Wendy Colby, CEO of AccelerED (UMGC IT)  
[Wendy.Colby@accelered.com](mailto:Wendy.Colby@accelered.com)

Southern New Hampshire University (SNHU)  
Contact info: Toby Carroll, Director of Development and Integrations  
[t.carroll@snhu.edu](mailto:t.carroll@snhu.edu)

Arizona State University  
Contact info: Lev Gonick, CIO  
[lev.gonick@asu.edu](mailto:lev.gonick@asu.edu)



The following two requirements reference section XI, Statement of Needs. We will address specific items in these requirements here, followed by detailed responses to the needs in Section XI, subsection by subsection, as they may address both requirements.

3. A written narrative describing the offeror's approach toward fulfilling the objectives and providing services sought by Mason. In addition, offeror shall identify the terms of any quality guarantee(s) offered. Address points outlined in section XI, Statement of Needs.

Higher Digital's "approach toward fulfilling the objectives and providing services sought by Mason" is addressed directly by the answer to section XI, Statement of Needs – subsection (1.b.) re: approach and methodology, and woven throughout the descriptions of our qualifications and experience responding to several other subsections.

Higher Digital works diligently to provide high quality services. Following our Assess / Strategize / Transform / Measure engagement process, we will regularly prioritize our deliverables every 2 weeks with input from GMU. Every 2 weeks, working with our GMU counterparts, we will plan the next 2 weeks of work, incorporating GMU feedback in case priorities have changed or Higher Digital sees the need to adjust our services or approach. This ensures that Higher Digital always focuses on the most important tasks and delivers the quality services that GMU pays for.

4. A written narrative describing the offeror's experience and qualifications in providing ~~trademark licensing services~~ IT related support services and consulting as outlined in section XI, Statement of Needs. In addition, offeror shall include brief biographical and experience information on the management team and any staff that will be responsible for servicing this contract (include an organizational chart).

Higher Digital's experience and qualifications are addressed later in the proposal, in response to section XI, Statement of Needs, subsections 1. a. c. d. e. f. g. and h. Our staff background and experience are provided below and further addressed in subsections 1.i. and j.

## Management Team

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### Wayne Bovier, Co-Founder and Chief Executive Officer

Wayne Bovier is a global expert in higher education. He has over 20 years of experience leading global product teams and organizations and has spent over twelve years working in international product leadership roles. Immediately prior to Higher Digital, Wayne led the digital transformation for the Laureate Education (LAUR) Global Products and Services division, including Walden University, University of Liverpool, and University of Roehampton.

Prior to Laureate, Wayne led the mobile, portal, analytics, document, and teaching and learning business lines for Ellucian, and led Blackboard's international, portal and mobile product strategy across all global regions. He has held product management roles with Wired Magazine and four start-up companies in Silicon Valley and Washington, DC.

Wayne holds a B.A. in English from Dickinson College in Carlisle, Pennsylvania, and an M.B.A. from the University of North Carolina at Chapel Hill, with a concentration in international business.

Read more: <https://www.linkedin.com/in/waynebovier/>

### Colleen Baker, Co-Founder and Chief Operating Officer

Colleen Baker leads digital transformation initiatives for Higher Digital customers, with client success as her key driver, leveraging her innovative thinking and expertise. She has spent the last 20 years transforming IT and software development in the insurance, education, and healthcare industries – optimizing teams and aligning organizations across departments and functions.





Colleen created a new framework (Simplified Enterprise Agile®), and has deep experience in software development, digital transformation, strategic planning, program management, technology operations, and end-user adoption; she fully understands the challenges in improving how organizations can create world-class digital experiences.

Prior to Higher Digital, Colleen led digital transformation initiatives for the Laureate Education Global Products and Services Division, including Walden University, University of Liverpool, and University of Roehampton – all leaders in online learning. She oversaw the transformation and change management for over 350 developers, testers, architects, product management, and technology executives. Before Laureate, Colleen provided technical leadership to the IT operations of several insurance companies.

Colleen has certifications as a SAFe Program Consultant (SPC), Agile Alliance Scrum Master (SM), ITIL 4.0 Professional, and Project Management Professional (PMP).

She holds a B.S. in Information Systems, University of Maryland, College Park, Maryland.

Read more: <https://www.linkedin.com/in/colleen-emar-baker-89b5a85/>

### **Joe Gottlieb, President**

President Joe Gottlieb is responsible for corporate strategy, product portfolio management, analytics and marketing. His role ensures that Higher Digital's business, product lines, and supporting functions are continuously pursuing an intentional vision through an explicit and well-understood strategy for enhancing customer value. He also works with customers on strategy development, change management, and strategic operations, energized by the complex challenges and profound opportunities facing higher education.

Gottlieb has spent his entire career helping enterprises to digitally transform, combining the broad view needed to grapple with heterogeneous IT architectures with the specialized perspectives required to address disruptive challenges and opportunities in identity management, security, cloud computing, databases, and networking. Along the way, he has managed hypergrowth (Nokia), built technology ecosystems (McAfee and SailPoint), raised startup capital (Sensage and Aerospike), taken companies public (META Group and SailPoint), and managed acquisitions – both being acquired (Sensage) and acquiring companies (Nokia and SailPoint).

In his last five roles, he has owned the strategic planning process for either his company (McAfee, Sensage, Aerospike, SailPoint) or division (Nokia). A strategic thinker and change agent, Gottlieb considers himself fortunate to have been actively engaged in digital transformation throughout his career.

Gottlieb holds a Bachelor of Science in Electrical Engineering from Cornell University, Ithaca, New York.

Read more: <https://www.linkedin.com/in/joegottlieb/>

## **Example Personnel for GMU Contract**

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### **Colleen Baker, Primary Relationship Manager**

Management team bio included above.

### **Kelley Bradder, Vice President, CIO Services and Security**

Kelley Bradder has spent her entire career working for or supporting higher education – over 25 years of it leading IT organizations, including the CIO and VP of Information Technology Services at Simpson College.

For Higher Digital, Kelley is currently serving as a CIO for a large global online public university and its primary IT contractor, addressing organization structure, digital strategy, strategic planning, and cybersecurity, and leading its first IT Governance Committee. Initiatives include optimization of service delivery for IT operations and support – with a specific focus on transforming the ITSM environment – customer and student experience, and creation of an enterprise information security program to manage risk. She is also completing an ITSM tool selection and implementation project



for a large county's community college to improve service delivery, while introducing standards and service level agreements for the service catalog to all departments.

Kelley has completed a consultancy engagement with the security operations team of another large state university, where she analyzed and benchmarked the maturity of their security operations, identified opportunities to develop a commercialized security operations center, and assessed the viability of productizing security services for other higher education institutions and state government agencies.

Kelley has certifications in ITIL methodology including the current ITIL 4.0 Foundations.

She holds a B.A. in Business Management and Management Information Systems from the University of Connecticut, Storrs, Connecticut.

Read more: <https://www.linkedin.com/in/kelley-bradder/>

### **Jason Pyle, Vice President, Digital Integrations and Architecture**

Jason Pyle has 20 years of experience as a software developer/architect/development leader, overseeing both small and large product development organizations, almost entirely in higher education. He has overseen server-side technology efforts involving integration, data modeling, APIs, SDKs, identity management, and more.

Jason is currently consulting at a large, mostly online university on their SIS migration from Colleague to Banner. He is technical lead for "co-existence" – the period of time when both SIS systems run concurrently during deployment, if necessary – working to ensuring that all connected systems can support data from either Colleague or Banner.

Among his previously completed consultancy engagements, he:

- Introduced Ethos to a state university, and trained staff on its use – replacing their legacy point to point integration architecture.
- Guided a large public university and its principal IT vendor through their successful build out of an Architecture organization that includes Enterprise Architects, Integration Architects, and Solution Architects, and coaching their integrations team on use of the software development lifecycle (SDLC), improving predictability and increasing the accuracy of reporting.
- Educating the IT organization and senior leadership of a mid-sized nonprofit university about the strengths and weaknesses of teams and the organization of teams and leaders, obtaining buy-in for implementation.
- Providing architectural leadership and guidance to a large online university as they moved from point-to-point integrations toward employing APIs and a hub-and-spoke model, combining the best of the Ethos Platform and the Mulesoft Enterprise Service Bus to build an integration architecture that already processes close to 1,000,000 messages per day.

Before Higher Digital, Jason was Director of Software Development at Ellucian, leading many Ethos platform development teams including Ethos Integration, Ethos Data Model, Banner APIs, API Extensibility, Ethos Extend, and Ethos Identity

Jason holds an M.S. in Software Engineering from George Mason University, Fairfax, Virginia, and a B.A. in Mathematics from McDaniel College, Westminster, Maryland.

Read more: <https://www.linkedin.com/in/jasonepyle/>

### **Henry DeVries, Ph.D., Vice President, Analytics & Finance**

Henry DeVries has over 44 years of experience in higher education, from graduate teaching assistant to faculty member to Chief Information Officer. For Higher Digital, Henry has worked with a large global public university, consulting on its Financial implementation, and performing a data migration evaluation for its SIS modernization project.



Just before joining Higher Digital, he was a Management Consultant Principal at Ellucian, performing activities including business process modeling, departmental governance planning, IT organizational assessment, reporting review, data governance, performance metrics, and business analytics reporting.

Prior to Ellucian, Henry served as the first Vice President for Information Services/CIO and CFO at Calvin University; on the faculty in the College of Agriculture and Life Sciences at Cornell University and Director of its Extension Electronic Technology Group; and as an Assistant Professor of Agriculture at Dordt University.

He has served on several EDUCAUSE Expert Panels and on the Boards of Directors of the Central Association of College and University Business Officers (CACUBO) and the National Association of College and University Business Officers (NACUBO).

Henry DeVries received a B.A. from Calvin College, Grand Rapids, Michigan, and an M.S. and Ph.D. from Cornell University, Ithaca, New York.

Read more: <https://www.linkedin.com/in/henrydevries2/>

### **Amy Shaw, Senior Director, Customer and User Experience**

Amy Shaw has 23 years of experience in design and user experience leadership, 20 of them in higher education. She has extensive experience in strategic planning, research, and product design, and providing user-centric experiences that serve end-users through research, testing, inspired design, and new technology innovations.

At Higher Digital, Amy is currently consulting with a large-county community college, helping them improve their IT service management (ITSM) and call center experiences, using discovery through user interviews and focus groups, analysis, recommendations, benchmarking based on an ITSM maturity model, and is currently creating an RFP and scorecard for their new ITSM product selection.

Recently Amy worked with a large global online public university to determine accessibility risks and provide a new governance strategy. She interviewed faculty and staff, benchmarked their current state, provided analysis and recommendations, chartered a governance committee, and developed a risk management model. Amy also spent a two years creating a new strategy and initial designs for a higher education software company's new faculty initiatives tracking platform, and consulted with a medium-sized nonprofit university on the research and strategy toward replacing its student and staff portal.

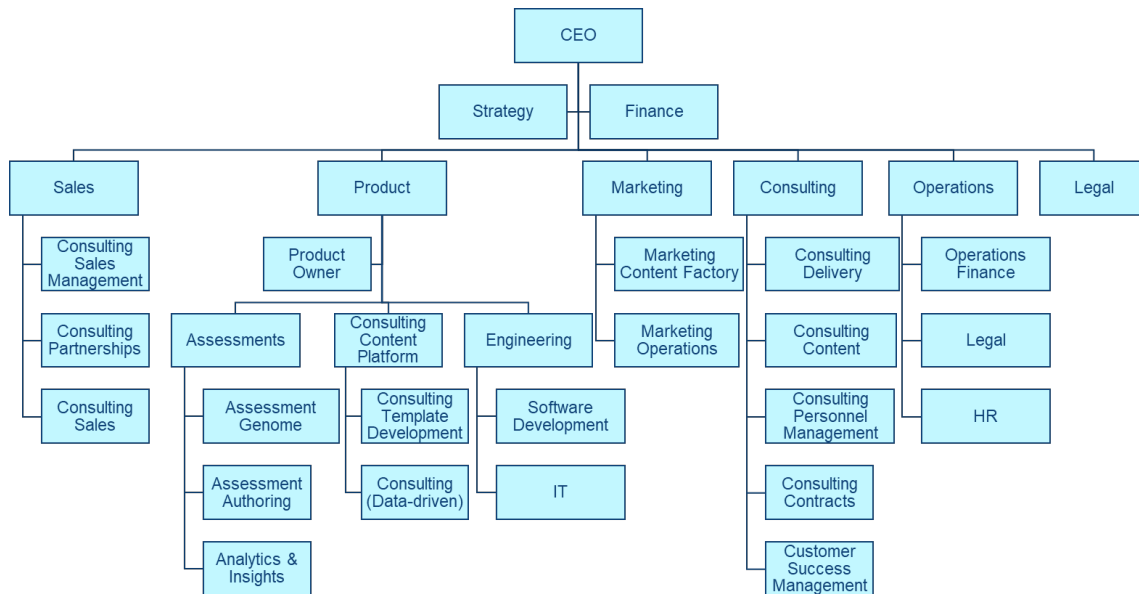
Prior to joining Higher Digital, Amy led the User Experience team at Ellucian and was responsible for the digital user-experience of the entire Ellucian digital ecosystem. The UX team at Ellucian utilized a number of quantitative and qualitative research approaches, including focus groups, heuristic evaluations, personas, surveys, and usability testing. She also designed web-based animated training modules and websites for several strategy and technology firms, and spent over 7 years teaching design courses at Northern Virginia Community College.

Amy holds a B.S. in Graphic Arts and Imaging Technology, Appalachian State University, Boone, North Carolina.

Read more: <https://www.linkedin.com/in/amyboyleshaw/>



## Higher Digital Org Chart



**XI. STATEMENT OF NEEDS:** George Mason University (Mason) desires to contract with qualified firms to provide high-level strategic and tactical expertise and a range of services to support technologies used by the University. It is anticipated that contracts will be awarded to multiple firms.

1. On-Demand IT Consulting Services - Work awarded in this area may still be informally competed amongst vendors that were selected from this RFP. Terms and Conditions will be conforming as provided herein. Contractor shall serve on special projects as a technology expert when requested and as needed. Reports shall be provided back to Mason summarizing options and providing recommendations. Contractor shall serve as a technology advisor to understand, communicate, and propose solutions as requested. Contractor shall serve as a resource of research, implementation, troubleshooting, and other technical tasks to support the efforts of George Mason University Information Technology Services (ITS) staff. Functional consultants shall be represented by the contractor as experts in the tasks and functions assigned.

Higher Digital is prepared to provide expert higher education consulting services on demand. We are comfortable operating in the manner described above. This includes consulting as a technology expert and providing reports back to the appropriate party at GMU – up to and including the President’s Council, Executive Council, or Board of Visitors & Rector – outlining options and providing recommendations, thus enabling the institution to make better decisions. We will also serve as a ready resource to backstop ITS staff, assisting with research and other technical tasks as required.

Higher Digital is an independent and agnostic partner who knows higher education; we focus on what is right for each institution and have no allegiances to specific vendors or products. Higher Digital prides itself on its ability to communicate the right information to the right people. The following answers to your detailed stated needs provide context and clarity around the different areas of expertise we bring to engagements, and we can provide examples to GMU as needed.



a. Provide detailed corporate competencies/experience serving one or more of the technologies and capabilities listed below:

1. Business Management Services:

- IT Operations – IT operations analysis, recommendations, and implementations
- Staffing – Senior to mid-level IT staff augmentation across IT and technology ecosystem
- Business Process Improvements – Analyze, recommend, and implement communication, coordination, and implementation improvement plan with major business and academic stakeholders.
- Benchmarking – real-time industry and peer benchmarking as well as internal, enterprise-wide stakeholder benchmarking providing full 360 view of George Mason Univ. across 20+ dimensions
- IT Strategic Planning
- Implementation Services including Technical Change Management

Higher Digital, via its CIO and IT Management business line, participates in engagement supporting the Business Management Services referenced in section (i) above. Higher Digital provides an innovative, software-as-a-service digital transformation management platform, (SEA)results®, that lowers the cost and time to provide advice to help institutions rapidly assess, benchmark, align, and plan how to best transform under their own unique circumstances.

Operational Assessments: Higher Digital can rapidly assess GMU in many operational areas including financial, infrastructure, academic, technology, enrollment, strategy, delivery, and security according to ISO-27001 standards and the NIST framework. Our ability to rapidly assess your institution and benchmark GMU against other higher education institutions will enable Higher Digital to spend less time conducting interviews and more time focusing developing a plan and executing on that plan.

Our cloud assessment platform focuses holistically on the institution and the way IT, line of business units, and the senior leadership team all play a role in the way an institution operates. The results of the assessments and benchmarking provide input into engagements focused on business process improvements, IT strategic planning, and implementation services, including strategic and technical change management.

Successes at institutions such as two large, principally online universities demonstrate our ability to successfully partner with institutions on business process improvements, IT strategic planning, and implementation services, including strategic change management.

For example, we have a staff member serving as the Chief Information Officer (CIO) of one of these schools, who leads and is actively transforming the IT Operations and Support organization. Activities and leadership responsibilities included the evaluation and optimization for service delivery for IT operations, including Cloud Services, Network Operations, Enterprise Applications, Telephony, Desktop Engineering, Service Desk Tiers 1-3, Security Operations, and Risk Management and Compliance; we also oversaw the deployment of a new Information Technology Systems Management (ITSM) solution and helped improve end user support by outsourcing the help desk. The measurable outcomes included a 20% reduction in call volume and improved end user support while freeing up valuable resources to focus on other needs.

Business Process Improvements: Additionally, Higher Digital broke down silos and fostered cross-functional cooperation to successfully manage more than 100 technology integrations and multiple dependencies across workstreams involved in the migration of a legacy SIS (PeopleSoft 9.0) to Anthology/Campus management. To make immediate progress, Higher Digital identified individual skill sets, within IT and within the business, and aligned them with key roles and tasks within workstreams. Training and coaching further aligned teams around goals, priorities, and principles. We continued to focus on ensuring engagement and buy-in, applying change management and IT management principles to the project while using the institution's existing tools and technology investments.



Staffing: Higher Digital is able to hire staff for leading and supporting IT and executive roles for GMU. Our skills, technical experience and knowledge, and deep understanding of higher education operations, business and academic functions sets us apart from most consulting companies.

Benchmarking: Higher Digital blends an independent knowledge and understanding of higher education with a data-driven approach. This data-driven approach leverages a cloud software solution – built by Higher Digital and used by more than 300 institutions – to understand how GMU benchmarks against peers. This tool also includes internal benchmarking capability to more accurately pinpoint strengths and weaknesses. This solution is built to keep all individuals and institutions anonymous

IT Strategic Planning: Higher Digital specializes in bridging the gap between IT execution and business and academic leadership. We leverage a data-driven approach highlighted earlier to lay the foundation for short- and long-term IT strategic planning. This effort blends and aligns an institution's strategic plan and priorities with the current IT backlog and needs.

Implementation Services including Technical Change Management: From ITIL to agile, Higher Digital will leverage your current processes, systems, tools, , etc. to enhance and improve IT delivery. Starting with request management to backlog grooming, Higher Digital will focus on improving delivery and change management services to enable efficient delivery of small to large IT projects.

2. Enterprise Applications Services to include Programming, Business Analysis, Software Solutions Architecture, Enterprise Resource Planning (ERP) Analysis and Development, Salesforce Development, Database Administration, and Website Development

Higher Digital (HD) has considerable expertise in Enterprise Architecture, Software Solutions architecture, and ERP analysis as part of its Enterprise Architecture business line. HD Consultants have a cumulative century or more of experience working with Banner, Ethos, and other Ellucian products – in fact, many of us helped design and build these solutions prior to joining HD. We are deep experts in the products, strategy and staffing at Ellucian. As an independent, agnostic consulting group, we can architect optimal solutions for GMU using both Ellucian and other vendors' products/services. In addition to working well with Ellucian, we've worked with a large swath of higher education technology and software companies across the entire enterprise.

At one large online institution, Higher Digital helped lead a revamping of their enterprise and integration architectures. This has required Higher Digital to understand all of the different solutions that the institution uses; we have worked with a variety of different vendors to help build a single enterprise architecture that is a best fit for their variety of products.

Additionally, Higher Digital has been involved in the institution's migration from the Ellucian Colleague SIS to Ellucian Banner SIS. This has included much work around software and enterprise architectures along with ERP analysis to help provide numerous services. We built a robust integration architecture leveraging Ellucian Ethos and the Mulesoft Enterprise Service Bus (ESB) and found creative ways to help execute a process called co-existence. Co-existence is defined running both the Colleague and Banner SIS' for a finite period of time. Higher Digital was brought in to provide innovative application services and leadership around this new challenge that neither Ellucian nor other vendors have encountered before .





3. Enterprise Infrastructure Services to include Cisco Network and Connectivity Technologies, Microsoft Enterprise Support Services, Virtualization, Cloud Architecture and Engineering, Systems Administration, and Voice and Video Collaboration

Among the capabilities specified in subsection (iii), Higher Digital is able to provide Cloud Architecture and Engineering services. Our Enterprise Architecture consultants have a wide variety of experience working on Cloud Architecture and Engineering projects. We helped architect and led the build-out of cloud-native applications such as Ellucian Ethos, utilizing AWS technologies. At one major customer, Higher Digital has focused on the use of Microsoft Azure technologies to provide cloud infrastructure services. This includes the use of Azure Cosmos and Data Lake services to support integration and reporting needs.

Higher Digital architects are also involved in the architecture of Higher Digital's (SEA)results product, which is a SaaS application built on the Microsoft Azure platform. Finally, our engagement at another large, online institution leverages the Azure Service Bus as part of its integration architecture.

Higher Digital's Enterprise Architecture practices has the expertise to ensure that the correct choices are made when making decisions related to cloud products and architectures – including the ability to combine cloud architecture with on-premises applications in a hybrid on-premises/cloud environment. Because most institutions are currently operating such hybrid environments, we can leverage our experience working with both – to use cloud where appropriate, support applications that still live on premises, or assist with moving on-premises applications to a cloud architecture.

4. Project, Program, and Portfolio Management Services to include Resource Capacity Planning, Resource Sourcing and Management, Time Management, Demand Management, Reporting Services, and Integration

Higher Digital supports every one of these services by employing our (SEA)change process and related services. Our (SEA)change methodology is designed to accommodate any change initiative, regardless of size, complexity, or domain. Whether you're ready to change from the top down with a fresh strategy; bottom up with new cloud infrastructure; in-between with operational system upgrades, migrations, or replacements; or all of the above, (SEA)change provides the process, training, and results your stakeholders need.

The (SEA)change process is our method for providing all project, program, and portfolio management services. By utilizing the (SEA)change process and getting the teams to plan together, this brings greater visibility to the entire institution and all leadership. By focusing on the overall institution, (SEA)change provides greater visibility into your program, focusing on not just IT work but all of the interdependencies across a project or program. This allows an institution to look at resource planning across the whole organization, allowing program leadership to identify resourcing needs and supporting the resource decisions GMU needs to make.

Additionally, Higher Digital provide services around reporting and integrations. Our team of enterprise architects are integration experts. We have decades of experience within the higher education domain including some of the initial design and implementation leaders who architected and built the Ellucian Ethos Platform.

For many engagements, our enterprise architecture team focuses on the current and future state of integrations and helps organize the future-state architecture and roadmap. For Ellucian institutions, we configure, train, and architect integrations on the Ellucian Ethos Platform, with more experience and greater expertise than any other consulting firm.

Our experience includes the use of Ethos with a variety of Enterprise Services Bus (ESBs) products to provide a robust integration architecture. We've done this for a range of customers, including large online institutions, state systems, public universities, and mid-sized private institutions.



Our Ellucian expertise has enabled us to engage with several Ellucian partners to assist with training and support services. Within the Ellucian partner community, we are considered experts in Ethos, and these companies have chosen Higher Digital's integration architecture and Ethos expertise to supplement Ellucian's support.

Finally, we've worked with institutions to implement reporting services. For example, we've helped institutions adapt cloud native technologies to provide a data lake for use by integrations and reporting services – building reporting within the integration architecture to provide a holistic solution. The outcome will reduce the number of extract, transform, and load processes (ETLs) and enable near-real-time data updates in the Data Lake – allowing reports and analytics to always have up-to-date data, rather than data that is between 1 and 24 hours old.

5. Security Services including Threat Management, Perimeter Security, Internal Network Security, Endpoint Security, Application Security, and Data Security.

Higher Digital has comprehensive strategic security service that addresses threat management, perimeter security, internal network security, endpoint security, application security, and data security.

As the interim CISO for a large global public online university, Higher Digital managed and mitigating risk as it:

- built a comprehensive Information Security Program and all associated policies,
- assessed and documented risk against CIS and CMMC controls,
- reconfigured endpoint security coordinating across 14 countries and all global teams.
- assessed vulnerabilities and managed threats by building targeted dashboards and reports and adding log correlation,
- addressed internal network security by restructuring network, port scanning, and port-based access control,
- collaborated with all enterprise teams to implement GDPR compliance by operationalizing data classification policies and CUI data mapping,
- worked with software development and Q/A teams to standardize security testing for software applications,
- guided security tool selection processes to replace firewall and network monitoring functions.





- b. Describe approach and methodology to providing IT service delivery to George Mason University. Include how your firm would manage the scope of projects and how your firm aligns with current best practices.

As we highlighted in the Executive Introduction, Higher Digital's methodology, (SEA)change, employs a flexible approach to managing change within an organization. Leveraging the best of numerous standard approaches, including ITIL, agile, and lean, (SEA)change harnesses only the most effective practices from several common frameworks. It readily adapts to any environment, leverages tools and structures already in place, and requires no specialized trainings or certifications.



1. **ASSESS:** We utilize a variety of research approaches, including (SEA)results, to assess where there are issues, risks, and pain points that need to be addressed.
2. **STRATEGIZE:** We benchmark maturity and provide expert recommendations to address pain points and take advantage of opportunities.
3. **TRANSFORM:** We provide best practices and options for short- and long-term transformation. Then, we engage your team in sustainable transformation practices by providing training or workshops that will enable them to continue the transformation over time.
4. **MEASURE:** We offer custom assessments, business objectives, KPI's, and risk reduction to support the measurement of your success

We customize (SEA)change to fit your organizational needs rather than trying to reshape your organization to fit an overly prescriptive framework. Its key philosophies:

- We stress the need for team members to hold themselves accountable for the sake of the entire team.
- We coach teams, explaining what happens if teams or people “go rogue.”
- We recognize that most organizations have previous investments in processes and tools, and we leverage these.
- We remain engaged with our customers to ensure a successful implementation of our framework, even after the initial work is done.
- Using (SEA)change, we help organizations implement Synchronized Planning, which provides a simplified framework for teams to reliably deliver on business objectives across large, complex initiatives.

Synchronized Planning helps an organization successfully manage the same initiative across multiple teams, proactively identifying and mitigating dependencies. We know that integration is the weakest point in any system or process. Reducing handoffs and focusing communication at integration points increases the rate of delivery success. This is facilitated via focused cross-team planning on a regular increment combined with a mid-increment check-in.

We also leverage governance and Project Management leadership teams to facilitate bidirectional communication across the enterprise, from business leadership to the workstream leads. Improved, regular communication and better collaboration across teams also ensure that the scope of projects is well understood and managed; any additional work requested or required is transparently communicated to decisionmakers and can be addressed quickly.



- c. Provide examples of the names, qualifications, and experience in personnel to be assigned to George Mason University. Designate who would be assigned as the primary relationship manager for this account. The University reserves the right to accept or reject any proposed or assigned consultant, without cause, at any time during the duration of the contract.

This instruction was already addressed with our combined answer to specific proposal requirement (4) on p. 8, including our management team, designated primary relationship manager, and examples of consultants that could work on GMU projects, and an org chart.

- d. Describe the ability to provide continuity of consultants throughout the duration of a project. Provide examples of both on-site and remote teams that would work with George Mason University.

Higher Digital will keep staff assigned to each engagement committed throughout its duration. In the case of unavoidable changes, we will work with GMU to identify a suitable and agreed-upon replacement, according to the terms of the Two-Party agreement, and avoid or minimize any gap to the extent possible.

- e. Describe services available from your firm and/or partners and associated costs.

The prices (hourly rates) charged for each of these services depends upon the level of the resource assigned to it, and in some cases the length or size of the engagement. This information is provided under Requirement (7) and Section XII, on page 30.

i. Enterprise Architecture/Integration Architecture

Higher Digital works with institutions to gain control over disparate systems and ensure data consistency and reliability, and institutes planning and communication processes that involve all appropriate stakeholders. This process often includes creating an improved integration architecture built upon standardized APIs and reducing custom integrations to improve response times and data consistency.

ii. ERP Implementation/Modernization –

Higher Digital works with all stakeholders to understand and mitigate potential effects of any implementation, and plans the appropriate systems for deployment and detailed steps involved, along with any coexistence that might be necessary in the case of a migration or significant upgrade.

iii. IT Management/CIO Services

Higher Digital's IT Management and CIO Services include an assessment of organizational structure, operations, IT service delivery and data governance, along with a skillset evaluation, and then crafting a strategy to improve upon these aspects of the IT organization and measure progress against goals; we can also provide IT leadership staffing on an interim basis during organizational transitions.

iv. Product Management & Strategy

Higher Digital provides advice and leadership required to create incremental and adaptable processes; fosters increased cross-team collaboration and regular communication with leadership and other stakeholders; and proposes organization structure recommendations if necessary, to enable the successful management of multiple products or programs simultaneously and the development of long-term product roadmaps and strategy moving forward.

v. (SEA)change Project & Program Process

Higher Digital's (SEA)change process was described in response to Section XI, subsection (1b), and in other places throughout the proposal.



vi. Strategic Security Services Assessment & Risk Management

Higher Digital has comprehensive strategic security services that encompass CISO staff augmentation, security operations evaluation, risk assessments against industry standards, CMMC security certifications, security policy and governance development, data security policy and implementation, incident response planning, vendor selection and overall risk management.

vii. User Experience and Accessibility

Higher Digital assesses the current state of user experience, student experience, and application accessibility, enabling the development of a strategy to both improve student and faculty/staff experience and to mitigate accessibility shortcomings and compliance risks, and well as oversees the implementation and measurement of success if needed.

viii. Business Process Re-Engineering

Higher Digital's subject matter experts help stakeholders examine existing business processes using LEAN methodologies to re-imagine and automate current processes – enhancing customer experience, eliminating waste, and gaining efficiencies.

ix. Vendor Evaluation & Selection –

Higher Digital conducts the discovery and prioritization of stakeholder requirements and pain points, and uses these inputs those to guide either an assessment of current vendors' and tools' performance against requirements or an evaluation of leading vendors in that space (usually including the incumbent if appropriate) – ranking them according to the prioritized requirements and recommending the best options and trade-offs.

f. Describe the ability to assist in the development and offering of training and documentation.

We will document the results of our work, present it, and train Mason personnel as needed. As described more fully in the next response:

- We provided training and coaching to product and project teams at a large, public online institution to support a more agile, collaborative approach on the SIS modernization project;
- During our accessibility risk assessment and reporting work at large public online institution , we developed a methodology for identifying and prioritizing compliance risk, while forming and training a new Accessibility Governance Committee in its application for reporting and planning purposes;
- At a private R1 research institution, we helped launch a new product management organization, and provided training and coaching in our (SEA)change process to help them collaborate effectively with stakeholders and developers in support of a unified roadmap and set of priorities across the institution.

We commit to working with GMU to set expectations at the beginning of any engagement laying out what level of training and documentation we are expected to provide.



- g. Provide examples of recent projects at representative agencies comparable to George Mason University. Describe the project, time frame, end result, etc. Prior higher education experience is preferred but not required.

## A Large Private University

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This institution is one of the fastest growing universities in the USA. Over 3,000 students attend classes in-person, with another 135,000 students engaged in the school's extensive online learning program.

### Cloud Migration & API Integration

This university partnered with Higher Digital to migrate its legacy on-premises technologies to an array of cloud-based applications, all of which needed to work together seamlessly. We began by modernizing the university's on-premises technology stack. This complex effort involved migrating numerous technologies to cloud-based systems and ensuring that they were properly integrated, so we also helped re-architect and design a replacement for the legacy point-to-point integration architecture, using Ellucian's Ethos Platform and the Mulesoft Enterprise Service Bus (ESB), unleashing a reusable API-based architecture that now provides data in nearly real-time throughout systems at the university.

Higher Digital leveraged existing processes and administrative tools to make this transformation as efficient as possible and tailored its approach to appeal to even the most skeptical on the leadership team. We focused on delivering measurable results that would resonate with executives while showing progress in KPIs, and by leveraging (SEA)change, we developed a more open and collaborative process.

### Salesforce CRM Integration

Recently, the Higher Digital team worked with this university to integrate its Salesforce CRM system, building an integration platform that leverages both Ethos and the Mulesoft iPaaS. Its roles are twofold:

- mapping relationships between the Salesforce and Ethos data models; and
- orchestrating messaging between Salesforce and Ethos.

In order to improve communication between silos and standardization integration components leveraged our (SEA)change methodology and coaching teams to spur enablement and break down organizational boundaries. The resulting transformation of the organization led to a successful integration implementation.

During the early stage of the project, we discovered that numerous subsystems were not REST enabled and couldn't benefit directly from the development of REST adapters. Due to priorities, we decided to keep the existing flat-file-based integrations in place for those applications that required flat-file data transfer.

HD helped architect an integration strategy that would benefit from Ethos Integration Hub messages, reduce Banner Database workload, and provide a robust solution for flat-files connectors; then we created a solution that leveraged university-standard Microsoft Azure by deploying an Azure Cosmos DataStore that would subscribe to all change notifications sent by Banner via Ethos and other interconnected subsystems, and then deployed the Lingk iPaaS solution to fortify and standardize flat-file connectors.

This strategy generated 40+ flat-file integrations, while capitalizing on the investment in the core RESTful Mulesoft-Ethos integration platform, enabling more rapid and cost-effective creation of whatever flat-file integrations were still necessary. We are now working with the institution to leverage the Microsoft Azure Cosmos DataStore as a foundation for reporting and analytics solutions that will depend less upon ETL tools and can employ near-real-time data.

### Ellucian Colleague to Banner Migration

Higher Digital is also working with this school on its Student Information System (SIS) migration from Ellucian Colleague to Banner, specifically leading the coexistence workstream. Because there is no break between terms (classes are conducted 52 weeks a year), there is no ready opportunity to turn off Colleague and then turn on Banner. HD is



devising integrations and business processes that will allow them to run two SIS's side-by-side for around six months – a migration challenge Ellucian hadn't previously encountered – leading the university to pioneer this coexistence process.

Our phased approach was more iterative than you might see in a typical ERP implementation. Development, Integrations, QA, and UAT all coexisted and coordinated in synchronization. We implemented 2-week sprints for cross program deliverables – incorporating time for daily alignment with business stakeholders – and employed risk and dependency management, realizing continuous improvement via bi-weekly retrospectives.

This institution's cloud services ecosystem required tighter integration in more than its technology, which is common in higher education. During this project, Higher Digital also closed procedural and organizational gaps between technology teams and university executives. We successfully addressed typical communication roadblocks that often plague ERP modernizations and similar large projects at universities by developing transparent communication structures to help executives understand progress on program deliverables.

## A Large Public Online University

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### Student Information System Modernization

This university is one of the largest distance learning institutions in the world, with over 90,000 global students and nearly 4,000 faculty. Its leadership contracted with Higher Digital to help create cross-functional change management to guide its Student Information System (SIS) technology implementation. As a result, they were able to complete this SIS modernization project while also experiencing unprecedented organizational change, incurring no downtime impacts for students or faculty. By also filling pivotal leadership gaps throughout this major undertaking, Higher Digital enabled this university to maintain critical business operations and continue to improve the student experience.

Higher Digital was brought in during year two of this school's SIS modernization project, which by then had a high risk of failure. Our first step was to quickly assess project status, gaps, risks, and dependencies across a broad portfolio of related processes and systems. The existing SIS implementation included over 100 integrations with other systems, and they were also in the middle of several other high-profile system modernization projects – including marketing automation, CRM, and Office 365 –overwhelming their internal teams. Cross-functional team management and governance that reflected the needs and decision-making authority of all stakeholders was critically needed.

We helped this institution focus and simplify its approach to project phases, paring down priorities to include only SIS modernization – which was most critical project – from the among original big-bang delivery target that included SIS, CRM, and Marketing Automation. This alleviated excessive risk and complexities, and back-burnered less pressing deliverables.

The new streamlined approach focused on delivery of the following features, successfully and with quality and consistency:

- Automated subscription billing
- Tungsten integration for chapter 31 students
- Auto calculation of final grades
- Centralized Faculty portal
- Straight line paths
- Predictive scheduling
- Disenrollment for non-participation

KPI metrics that were tracked during implementation included:

- Reviewing and approving new / improved student, staff, and faculty processes:
  - 15 full student life cycle journey maps across 125 business functions
  - 290 processes for automation and reporting
- Configuration audit of the new SIS, including identification of 50+ new gaps / configurations
- Data migration tracking, including quality of records, records migrated, and testing pass rates



It was imperative to establish cross-functional team management and governance reflecting the needs and decision-making authority of all stakeholders. To synchronize these efforts, Higher Digital employed its Simplified Enterprise Agile® process and (SEA)change digital transformation methodology. Utilizing (SEA)change, Higher Digital provided the training, coaching, and team optimization necessary to improve alignment across such a large enterprise IT initiative.

We reviewed the skill sets of the internal team and key vendors, along with processes, technology infrastructure, and situational context. It was clear that major architectural decisions were required, and the team suffered from fatigue caused by the pressure to produce results quickly, despite using a legacy waterfall process that spanned multiple major implementations. Executive leadership and technology teams struck a new collaborative partnership that focused on managing complex interdependencies and quickly delivering the solutions most needed by their customers and stakeholders.

Higher Digital mapped the student life-cycle journey, applying lean principles to minimize touchpoints and hand-offs in the student and staff interactions with the ERP system. Expectations around the roadmap and launch dates were reset, with a focus on iterative, high-value releases rather than the previous high-risk, big-bang, waterfall approach.

### **Accessibility & Governance**

This institution also needed to assess the risk and develop a strategy to address accessibility and its governance, both for overall compliance with accessibility standards and to produce a report required by the parent system's Enterprise Risk Management process.

Higher Digital followed these steps:

1. Conducted contextual user interviews with a wide variety of students and faculty;
2. Benchmarked their current state of accessibility maturity;
3. Provided discovery analysis and recommendations;
4. Established a governance committee, working with key stakeholders;
5. Worked with key members of this committee to develop a custom risk management model and provided training to the full governance committee;
6. Provided KPIs for measuring success of strategy initiatives;

After this engagement, the institution had gained a full understanding of the current state of its accessibility efforts and developed a strategic approach for responding to its parent system's Enterprise Risk Management process; the new governance committee is now working toward meeting the goals laid out in its strategic accessibility plan.

## **A Mid-Sized Private University**

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### **Endowment Program Digital Transformation**

A private university situated in a major U.S. city – with over 14,000 students, more than 170 programs, and thousands of new students onboarded each year – hired Higher Digital to digitally transform its endowment program. We focused on people and processes, increasing buy-in from key stakeholders, leadership, and functional business units, while ensuring that development was aligned with the university's top priorities. We leveraged existing processes and administrative tools to make the transformation both familiar and as efficient as possible and tailored our approach to resonate with even the most skeptical leadership team members by delivering measurable results that drove progress and helped organizations achieve their KPIs.

This school was also an early adopter of (SEA)results®, Higher Digital's easy-to-use software-as-a-service platform that helps organizations achieve true digital transformation. (SEA)results leads higher education institutions through a step-by-step process that includes a digital transformation assessment, planning and prioritization, implementation, and ongoing measurement.





## Product Management Organization and Training

To help the institution launch a new product management organization, Higher Digital leveraged its Simplified Enterprise Agile® process and methodology, also known as (SEA)change. (SEA)change allows Higher Digital to provide organizations with a lean product process, along with the training, coaching, and team optimization necessary to improve alignment across large enterprise IT initiatives – all supported by a leadership-driven, strategic change management approach.

Higher Digital's (SEA)change process and training equipped this new product management organization to:

1. work with business stakeholders to better understand their digital challenges, and
2. own and manage a product roadmap that covered different divisions within the university.

The introduction of Product Manager and Product Owner roles helped them catalyze bi-directional communication between leadership and management teams and better align with the stakeholders and technology teams implementing projects. These roles ensured the prioritization of requirements from university leadership and ownership of deliverables by technology teams executing the work. The product leadership team was also responsible for the overall implementation of the roadmap and milestones.

## (SEA)change Adoption by the University

The institution needed the ability to rapidly deploy its digital transformation initiatives, including its SIS, in order to meet the ambitious goals outlined in a new strategic plan. Building on the success of our initial engagements, it adopted Higher Digital's (SEA)change framework, providing its organizations with the training, coaching, and team optimization needed to implement a true and effective digital transformation program encompassing all workstreams, stakeholders, applications, and services.

Higher Digital instituted a new product-oriented process that enabled the school to roll out new projects on a continuous basis, while keeping users – from faculty to students to donors – at the center. Higher Digital helped transform the people and processes behind these new technologies as well, increasing buy-in from key stakeholders, leadership, and functional business units, which ensured that technology development remained in line with the university's top priorities.

h. Describe the ability to provide for a thorough transfer of knowledge to Mason IT on any given project.

Higher Digital considers a thorough knowledge transfer core to all the services that we deliver. With each engagement, our goal is to provide high quality services plus a knowledge transfer so that your institution can own the output of the engagement. This is a core principle that Higher Digital includes in all engagements with customers.

For each engagement, our goal at completion is for you to be able to support it with your own staffing rather than relying on Higher Digital for a follow-up engagement. With any training (e.g. (SEA)change), we provide a very thorough training program including training documents that your institution can use for reference in the future. Furthermore, we also provide a sufficient time for turnover to your team.

As your team takes ownership of the output from an engagement, we prefer to support your team for an agreed upon timeline, serving in a support capacity in case there are questions that arise. We also do a retrospective at the end of every engagement with each customer. This allows for your team to provide feedback on the services and to give a final sign-off that you are satisfied with the engagement and training.



- i. Describe how your firm would propose a functional staffing plan indicating the number, characteristics, and schedule for the consultants.

Higher Digital works closely with our customers to not only propose a staffing plan, but also to elicit feedback and react appropriately. Many factors that go into a functional staffing plan, which considers not only Higher Digital resources but the availability of GMU resources as well.

Due to this, we work with each customer to understand how to align our resources with your resources. In some cases, we can use some full-time resources due to the availability of GMU resources. In other cases, we might need to stagger or support part-time resources due to GMU resources being unavailable on a full-time basis. As we look at staffing, we focus on the skills needed for an engagement alongside the GMU resources and their availability.

Additionally, because of our adaptable (SEA)change methodology, we will iteratively touch base on progress every 2 weeks. This allows both GMU and Higher Digital to closely monitor the engagement and adjust resources based on pace, availability of GMU resources, and any changes that arise during the course of an engagement.

- j. Describe any functions to be subcontracted and the expertise and credentials required from the subcontractor.

We do not anticipate subcontracting any functions or capabilities that we offer to other parties. If we do wish subcontract any IT consulting services work assigned to us, we will first seek approval according to the terms of the governing Two Party Contract.

Returning to Section XIII, subsection B – specific requirements:

5. Provide a specific plan for implementation and transition of services from date of award forward.

To implement any projects agreed to under this contract, Higher Digital will transition our committed resources and begin the engagement as quickly as possible, conduct a kick-off meeting for larger projects, and immediately set communication and reporting expectations.

6. Sample Reports: offeror shall include the following sample reports in their proposal:

- a. Sample quarterly sales report.

REDACTED





7. Provide proposed financial offer/considerations, including service pricing for ~~licensees (retail and internal)~~ IT related support services and consulting.

For requirement 7, we include detailed answers to the requirements listed in section XII – COST OF SERVICES:

**XII. COST OF SERVICES:** Please provide hourly pricing for any and all rates associated with consulting, planning, install, implementation, development project management, etc. Specifically address the following in your proposal:

Higher Digital's standard rates for engagements under this agreement are as follows:

Executive Consultant	\$225/hour
Senior Consultant	\$200/hour
Consultant	\$180/hour

Our rates are negotiable for larger projects, depending on their length and scope, and can specify either fixed-price or time-and-materials structures.

- a. Confirm that travel expenses will be reimbursed at cost with no markup and may not exceed Commonwealth of Virginia expense guidelines and per diem rates which are available here: <https://fiscal.gmu.edu/travel/learn-about-meals-per-diem-rates/>

Any travel expenses incurred by Higher Digital will be passed along to GMU without markup and follow all expense guidelines provided.

- b. If different than hourly pricing, describe training options and associated costs. Include a catalog of training offerings and differentiation between technical staff and end-user training.

Training is priced using our standard rates, unless a different rate is negotiated as part of a larger engagement.



c. For your last ten most recent projects (Determined by date of final payment by the customer) that exceeded \$50k and were billed on an hourly basis, list the following:

1. The type of consulting
2. The original estimated hours
3. The final hours billed
4. The original project cost estimated \*
5. The final price(all charges) paid by the customer

Project	Type of consulting	Original Estimated Hours	Final Hours Billed	Original Estimated Cost	Final Price Paid by Customer
CIO & Security Consulting	IT Ops & Infrastructure, IT Service Delivery	960	960	\$ 172,800	\$ 172,800
SIS, Financial Aid, & Integrations Implementation	Program Management & Enterprise Architecture	1344	1344	\$ 491,520	\$ 245,760
Agile, Executive, Organizational Consulting	Program Management & Enterprise Architecture	500	500	\$ 72,000	\$ 72,000
Trusted Learner Network Consulting	Digital Strategy and Innovation	350	350	\$ 70,000	\$ 70,000
SIS Implementation Integration Architecture	Enterprise Architecture	512	512	\$ 80,000	\$ 80,000
Integration Architecture Consulting	Enterprise Architecture	376	476	\$ 62,040	\$ 78,540
Managed Services & SIS Implementation	Change Management, EA, Executive Leadership	2,724	2,724	\$ 553,000	\$ 553,000
UX Streamlined Teams Coaching	User Experience	896	896	\$ 134,400	\$ 134,400
Streamlined Teams Coaching	Program Management & Enterprise Architecture	1842	1842	\$ 225,000	\$ 225,000
Strategic Organizational Analysis	Program Management & Strategic Analysis	540	540	\$ 108,000	\$ 108,000

- Note: Our contracts include both fixed price and time & materials payments.