



## **IT Consulting Services**

### **Request for Proposal GMU-1700-21**

Deloitte Consulting LLP

January 22, 2021



### Confidentiality/Freedom of Information Act Designation

Deloitte Consulting LLP invokes the protections of §2.2-4342 of the Code of Virginia and requests the following provisions of its Proposal be withheld from disclosure by George Mason University pursuant to §2.2-4342F of the Virginia Public Procurement Act and §§ 2.2-3704.01, 2.2-3705.1(10), and 2.2-3705.6(10) of the Virginia Freedom of Information Act. We have organized our list in accordance with the four key elements as outlined below and as further evidenced in the redacted Proposal provided herewith.

Section/Title	Page Numbers	Reason why Protection is Necessary
<b>Qualifications &amp; Experience</b> RFP Section XI.1.c	48-49	<b>Identity and Qualifications of Personnel:</b> §2.2-4342(F). Trade Secret and Proprietary Information submitted by the bidder. This information is nonpublic, confidential proprietary and trade secret information, the disclosure of which would cause substantial harm to Deloitte's competitive position.
<b>Experience and Qualifications</b> RFP Section XIII.B.4	70-74	
<b>Business Management Services</b> RFP Section XI.1.a.i	8, 13, 14, 16, 17	<b>Proprietary Methodology and Approach:</b> §2.2-4342(F). Trade Secret and Proprietary Information submitted by the bidder. This information is nonpublic, confidential proprietary and trade secret information, the disclosure of which would cause substantial harm to Deloitte's competitive position.
<b>Enterprise Infrastructure Services</b> RFP Section XI.1.a.ii	29	
<b>Security Services</b> RFP Section XI.1.a.v	41	
<b>IT Service Delivery Approach and Methodology</b> RFP Section XI.1.b	46, 47	
<b>Knowledge Transfer</b> RFP Section XI.1.h	59	
<b>Experience and Qualifications</b> RFP Section XIII.B.4	74	
<b>Sample Reports</b> RFP Section XIII.B.6	78	
<b>Corporate Experience &amp; Competencies</b> RFP Section XI.1.a	4-5	<b>Client Names, Reference Information, and Experience:</b> §2.2-4342(F). Trade Secret and Proprietary Information submitted by the bidder. This information is nonpublic, confidential proprietary and trade secret information, the disclosure of which would cause substantial harm to Deloitte's competitive position.
<b>Business Management Services</b> RFP Section XI.1.a.i	7, 11, 16	
<b>Enterprise Applications Services</b> RFP Section XI.1.a.ii	20, 21, 22	
<b>Enterprise Infrastructure Services</b> RFP Section XI.1.a.iii	29, 30	
<b>Security Services</b> RFP Section XI.1.a.v	41, 42, 43	
<b>IT Service Delivery Approach and Methodology</b> RFP Section XI.1.b	46	



Section/Title	Page Numbers	Reason why Protection is Necessary
<b>Qualifications &amp; Experience</b> RFP Section XI.1.c	48, 49	
<b>Recent Projects</b> RFP Section XI.1.g	56, 57, 58, 59	
<b>References</b> RFP Section XIII.B.2	69	
<b>Experience and Qualifications</b> RFP Section XIII.B.4	70-73	

Signature: \_\_\_\_\_



Title: Principal



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January 22, 2021

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Purchasing Department  
4400 University Drive, Mailstop 35C  
Fairfax, VA, 22030

**RE: In Response to Request for Proposal (RFP) GMU-1700-21: GMU IT Consulting Services**

Dear Ms. Rodgers and Ms. Sirotin:

Deloitte Consulting LLP ("Deloitte"<sup>1</sup>) would like to thank you and George Mason University for the opportunity to respond to the University's Request for Proposal (RFP) # GMU-1700-21 – IT Consulting Services. We are looking forward to the opportunity to demonstrate our experience, expertise, capabilities and qualifications in your quest to find a firm that will provide high-level strategic and tactical expertise across a range of services to support technologies in use by the University.

Deloitte has served Higher Education institutions for over 90 years – from statewide systems of Higher Education and academic medical centers to community colleges and Higher Education research foundations. During the past 20 years alone, we have worked with over 200 Higher Education institutions across the US. Our experience in delivering IT consulting services ranges across a broad landscape of projects, to include IT strategy and technology assessments, network and cloud transformation, cyber security services, workforce transformation, complex ERP implementations, application development, and managed technical services just to name a few.

Deloitte, a global leader in Information Technology (IT) strategy and consulting, has meticulously crafted a response that documents our capabilities and experience as well as our approach to working collaboratively with Mason in providing a broad range of IT services, both strategic and tactical, to further Mason's status as an innovative, entrepreneurial institution with global distinction in a range of academic fields. We believe Deloitte is the right firm for Mason to partner with and would like to highlight the following primary reasons:

- **Industry Leading Higher Education Practice, Services and Practitioners.** Our teams are made up of Higher Education technology professionals with experience across multiple projects, functions, applications, and institutions, with both consulting and industry experience. Our experience, tools, accelerators, and capabilities span the spectrum of technology solutions from assessment to design, development, configuration, and implementation while simultaneously integrating our proven organizational change management philosophy. Furthermore, our Higher Education practice includes professionals specializing in research administration, cyber risk and intelligence, internal audit, human capital management (HCM), finance, and student transformations.
- **"Mission First" Approach to Delivery.** The most critical component of our qualifications is our depth of experience serving the largest, most complex Higher Education institutions, a majority of which are classified as R1 institutions. In the last five years alone, we have served more than 200 universities in implementing business and technology solutions. Our practice is built around the philosophy of a "mission first" approach to delivering large solutions, where many of our competitors approach these implementations as "technology first." In our experience, focusing on "technology first" does not work.

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<sup>1</sup> As used in this document, "Deloitte" means Deloitte Consulting LLP, a subsidiary of Deloitte LLP. Please see [www.deloitte.com/us/about](http://www.deloitte.com/us/about) for a detailed description of the legal structure of Deloitte LLP and its subsidiaries. Certain services may not be available to attest clients under the rules and regulations of public accounting.



Our business-centric approach allows us to understand your culture, your people, and your processes to better personalize the solution for your campus. Furthermore, Deloitte's practitioners have worked on campuses across the country, and bring leading-practice points-of-view on recruiting, admissions, financial aid, registration, course management, advising, alumni relations, and other functional disciplines. Consequently, they are empathetic and work diligently to understand how your solution will affect students, faculty, and staff who will use it. This experience and perspective make us a unique partner to assist you on this journey.

- **Track Record of Results.** We are dedicated to advancing the mission of Higher Education by partnering with institutions nationwide to achieve lasting, impactful and measurable results. As a result of our recent IT assessment and implementation projects similar to Mason's needs, our clients were able to achieve greater efficiency, effectiveness and innovation, while also reducing risk. This is also demonstrated by industry recognition: we were ranked #1 in a recent Forrester evaluation of consultancies offering IT organization design advice and implementation services.

Deloitte has a wide-ranging ecosystem of technology and service providers that can provide Mason with flexibility in utilizing emerging technology that is "right sized" and customized to Mason's requirements and needs. Mason's leadership can rest assured that recommendations and solutions developed by Deloitte will be deeply rooted in Mason's requirements and initiatives, not quarterly sales projections. Furthermore, we are well-versed in working with vendors and service providers in developing value-based solutions that provide for the sharing of benefits gained from performing above expectations and goals while conversely penalizing for low performance. Value-based initiatives provide the right level of incentive for vendors and service providers alike to work in the best interest of Mason and the right level of leverage when needed.

We recognize that COVID-19 has increased focus on the effectiveness of IT at institutions like Mason and in turn created more urgency to find a partner that you can rely on support your institutional needs. We are committed to and experienced with providing flexibility in delivering our services, whether performed remotely or on-site.

We are pleased to provide any additional information about our expertise, experience and services if needed. Should you have any questions, please feel free to contact me at (626) 379-5243 or [jqua@deloitte.com](mailto:jqua@deloitte.com). We are excited at the opportunity to establish a partnership with Mason and look forward to working with you.

Sincerely,



James Qua

Principal



## RFP Requirements Mapped to Response

The following section outlines our understanding of the George Mason University's requirements for this response and how we have structured our response accordingly.

GMU RFP Section Heading	GMU RFP Requirements	Deloitte RFP Response
<b>XI.1.a. Statement of Needs, On-Demand IT Consulting Services</b>	Provide detailed corporate competencies/experience serving one or more of the technologies and capabilities listed below: <ul style="list-style-type: none"> <li>i. Business Management Services to include projects such as Operational Assessments, Business Process Improvements, Benchmarking, IT Strategic Planning, and Implementation Services including Technical Change Management</li> <li>ii. 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</li> <li>iii. 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</li> <li>iv. Project, Program, and Portfolio Management Services to include Resource Capacity Planning, Resource Sourcing and Management, Time Management, Demand Management, Reporting Services, and Integration</li> <li>v. Security Services including Threat Management, Perimeter Security, Internal Network Security, Endpoint Security, Application Security, and Data Security.</li> </ul>	<a href="#">Statement of Needs</a> Page 3
<b>XI.1.b Statement of Needs, On-Demand IT Consulting Services</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.	<a href="#">IT Service Delivery Approach and Methodology</a> Page 43
<b>XI.1.c Statement of Needs, On-Demand IT</b>	Provide examples of the names, qualifications, and experience in personnel to be assigned to George Mason University. Designate who would be 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.	<a href="#">Qualifications &amp; Experiences</a> Page 47
<b>XI.1.d Statement of Needs, On-Demand IT</b>	Describe the ability to provide continuity of consultants throughout the duration of project. Provide examples of both on-site and remote teams that would work with George Mason University.	<a href="#">Service Continuity</a> Page 48
<b>XI.1.e Statement of Needs, On-Demand IT</b>	Describe services available from your firm and/or partners and associated costs. Examples of services that could be included are: <ul style="list-style-type: none"> <li>i. Implementation</li> <li>ii. Development</li> <li>iii. Project Management</li> <li>iv. Architecture and Design</li> <li>v. Capacity Planning</li> <li>vi. Installation and Configuration</li> <li>vii. Performance and Scalability</li> <li>viii. Conversion</li> <li>ix. Monitoring, administration and upgrades</li> <li>x. Operations metrics</li> </ul>	<a href="#">Cost of Available Services</a> Page 50
<b>XI.1.f Statement of Needs, On-Demand IT</b>	Describe the ability to assist in the development and offering of training and documentation.	<a href="#">Training and Documentation</a> Page 54
<b>XI.1.g Statement of Needs, On-Demand IT</b>	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 href="#">Recent Projects</a> Page 55
<b>XI.1.h Statement of Needs, On-Demand IT</b>	Describe the ability to provide for a thorough transfer of knowledge to Mason IT on any given project.	<a href="#">Knowledge Transfer</a> Page 58



GMU RFP Section Heading	GMU RFP Requirements	Deloitte RFP Response
<b>XI.1.i Statement of Needs, On-Demand IT</b>	Describe how your firm would propose a functional staffing plan indicating the number, characteristics, and schedule for the consultants.	<a href="#">Functional Staffing Plan</a> Page 60
<b>XI.1. j Statement of Needs, On-Demand IT</b>	Describe any functions to be subcontracted and the expertise and credentials required from the subcontractor.	<a href="#">Subcontractor Functions and Expertise</a> Page 64
<b>XII.a Cost of Services</b>	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: <a href="https://fiscal.gmu.edu/travel/learn-about-meals-per-diem-rates/">https://fiscal.gmu.edu/travel/learn-about-meals-per-diem-rates/</a>	<a href="#">Cost of Services</a> Page 65
<b>XII.b Cost of Services</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.	<a href="#">Cost of Services</a> Page 65
<b>XII.c Cost of Services</b>	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	<a href="#">Cost of Services</a> Page 69
<b>XIII.B.1 Proposal Preparation and Submission Requirements, Specific Requirements</b>	<u>Procedural information:</u> a. Return signed cover page and all addenda, if any, signed and completed as required. b. Return Attachment A - Small Business Subcontracting Plan. c. State your payment preference in your proposal response. (See section XVI; page 8) 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.	<a href="#">Procedural Information</a> Page 70
<b>XIII.B.2 Proposal Preparation and Submission Requirements, Specific Requirements</b>	<u>References:</u> No fewer than three (3), preferably from other comparable higher education institutions to which your firm is/has provided trademark licensing services which are similar in size and scope to that which has been described herein, that demonstrate the offeror's qualifications.	<a href="#">References</a> Page 70
<b>XIII.B.3 Proposal Preparation and Submission Requirements, Specific Requirements</b>	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.	<a href="#">Approach Towards Fulfilling Objectives And Services</a> Page 70
<b>XIII.B.4 Proposal Preparation and Submission Requirements, Specific Requirements</b>	A written narrative describing the offeror's experience and qualifications in providing trademark licensing services 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).	<a href="#">Experience and Qualifications</a> Page 71
<b>XIII.B.5 Proposal Preparation and Submission Requirements, Specific Requirements</b>	Provide a specific plan for implementation and transition of services from date of award forward.	<a href="#">Transition Plan</a> Page 75
<b>XIII.B.6 Proposal Preparation and Submission Requirements, Specific Requirements</b>	<u>Sample Reports:</u> offeror shall include the following sample reports in their proposal: a. Sample quarterly sales report.	<a href="#">Sample Reports</a> Page 77



GMU RFP Section Heading	GMU RFP Requirements	Deloitte RFP Response
XIII.B.7 Proposal Preparation and Submission Requirements, Specific Requirements	Provide proposed financial offer/considerations, including service pricing for licensees (retail and internal).	<a href="#">Financial Offer/Considerations</a> Page 79



## Statement of Needs (RFP Section XI.1)

### Corporate Experience & Competencies (RFP Section XI.1.a)

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#### RFP Reference: XI.1.a Statement of Needs

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

- vi. Business Management Services to include projects such as Operational Assessments, Business Process Improvements, Benchmarking, IT Strategic Planning, and Implementation Services including Technical Change Management
  - vii. 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
  - viii. 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
  - ix. Project, Program, and Portfolio Management Services to include Resource Capacity Planning, Resource Sourcing and Management, Time Management, Demand Management, Reporting Services, and Integration
  - x. Security Services including Threat Management, Perimeter Security, Internal Network Security, Endpoint Security, Application Security, and Data Security.
- 

George Mason University (Mason) is seeking a firm that can provide high-level strategic and tactical expertise across a range of services that will support the technologies used by the University. In this capacity, Mason is looking for a partner that can serve as a trusted technology advisor to understand, communicate, and propose solutions as requested. In addition to these advisory services, the partner will serve as a resource of research, implementation, troubleshooting, and other technical tasks to support the efforts of Mason's Information Technology Services (ITS) staff. Deloitte brings the depth and breadth of technology services capabilities and the experience needed to support the University across diverse technology needs.

Deloitte Consulting LLP is a subsidiary of Deloitte LLP, which is a member firm of Deloitte Touche Tohmatsu Limited (DTTL), a global company with member firms in more than 150 countries. Deloitte is one of the oldest and most respected professional service organizations in the U.S. Our parent company was founded in 1845, and today we are the largest global professional services organization. Our technology and management consulting services are complemented with industry leading enterprise risk management, assurance and advisory, tax, services, deploying more than 312,000 professionals globally with annual revenues exceeding USD \$46.2 billion (FY19). With over 106,000 US personnel across 115 offices in 97 cities, we tackle complex client issues for nearly one-fifth of the world's largest enterprises. Our Higher Education practice has served more than 175 Higher Education institutions across consulting, advisory, audit, and tax service offerings, including:

- 20 of the top 26 national universities
- 19 of the top 25 private universities
- 8 of the top 10 public universities

Deloitte is dedicated to advancing the mission of Higher Education by working hands-on with institutions nationwide to achieve lasting, impactful and measurable results. We are a recognized leader in the Higher Education space and have solved complex problems on over 900 projects with public and private Higher Education institutions nationwide. Deloitte's Higher Education team has experienced professionals and industry leaders that turn ideas into impact for Higher Education institutions. Our professionals have solved some of the toughest Higher Education challenges for our clients, including operational and financial transformation, student experience redesign, enterprise technology solutions, organizational leadership, and change management.











## Business Management Services (RFP Section XI.1.a.i)

We deliver **Business Management Services** by drawing on capabilities and offerings from several areas of our practice. The table below outlines the types of services that Deloitte can provide Mason as requested in the RFP.

Business Management Services	Experience?	Description
<b>Operational Assessments</b>	✓	<ul style="list-style-type: none"> <li>Analyze processes and procedures of Mason and perform reliable and consistent evaluations across a variety of functions to improve operational efficiency across the organization</li> </ul>
<b>Business Process Improvements</b>	✓	<ul style="list-style-type: none"> <li>Enhance and streamline processes as needed with a focus on customer service and support of end user needs</li> </ul>
<b>Benchmarking</b>	✓	<ul style="list-style-type: none"> <li>Assess the performance of Mason compared to current trends in the market, their peers, and world-class organizations in other sectors outside of Higher Education and quantify opportunities for improvement</li> </ul>
<b>IT Strategic Planning</b>	✓	<ul style="list-style-type: none"> <li>Reduce costs, improve service, and achieve greater efficiency and effectiveness at Mason by optimizing processes, eliminating duplication, simplifying work, and leveraging technology to serve the diverse needs of campus stakeholders</li> </ul>
<b>Implementation Services including Technical Change Management</b>	✓	<ul style="list-style-type: none"> <li>Organize and align IT operations and strategy to support Mason and its mission, values, and priorities</li> </ul>

Table 2 – Business Management Services

Deloitte has 60+ years of experience supporting Higher Education and public sector institutions with IT business management services for IT similar in size and scope as what Mason is seeking.

Both the current challenges facing Higher Education institutions as a result of COVID-19 and the resulting changes to the way universities operate to fulfill their mission, are forcing leadership to take a fresh look at the IT services and capabilities needed to support that sudden and unexpected change. The evolving Higher Education landscape as the industry responds to COVID-19 brings the reliability, availability, and security of the underlying core IT services of the institution into the spotlight more than ever. This unexpected evolution of Higher Education, coupled with ongoing trends impacting funding, enrollment, and student success make the need for a disciplined business-oriented perspective of enterprise IT increasingly critical.

Deloitte has a strong track record in designing and implementing market-leading IT solutions that enable IT operating models, workforce and financial transformation, in support of the evolving needs and mission of an institution. Our business management services provide a comprehensive view of IT across Mason to enable the University's mission of education, research, and service to address each of the areas identified in this RFP.

These services have engendered exceptional growth and efficiency in the IT infrastructure, IT support and services, and IT management processes and procedures for Deloitte's clients. Additionally, Deloitte's experience offers the advantage of encountering and learning from unique challenges particular to each implementation and client.



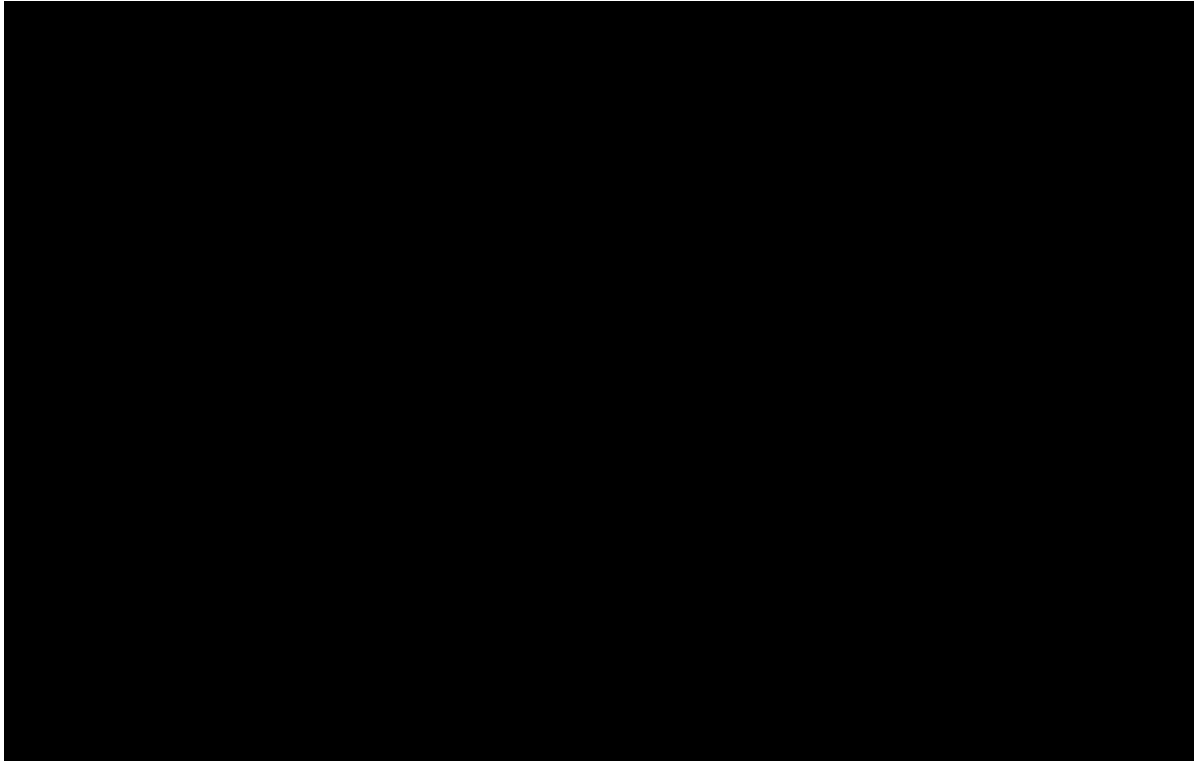


This experience, along with our understanding of applying best practices in the technology environment in Higher Education, is reflected in our IT Transformation (ITT) Framework for Higher Education. This model offers the means to align Mason's technology approach with leading practices in Higher Education and IT strategy and management across industries and better position the University to efficiently and effectively deliver technology services to students, faculty, researchers, and staff, striking the right balance of centralized and distributed IT across a campus.

Our ITT Framework is based on the understanding that while certain parts of an institution's IT may be studied or assessed separately, they still have dependencies on other facets and do not exist in a vacuum. The framework covers the six (6) major components of effective IT operations – IT Governance, IT Finance, IT Talent, Technology Capabilities, IT Security and IT Service Management – drawing from industry-accepted practices but tailored for Higher Education and the unique operating environment of Mason.

The table below depicts Deloitte’s ITT Framework for Higher Education, and the six major components that it encompasses.





Deloitte's ITT Framework enables a comprehensive view of IT across large, complex University IT environments. In depth focus areas for the components of the IT operations are below:

- **IT Governance** - enhances the current governance structure across Mason to effectively support Mason IT objectives and the evolving technological needs of the University, including strategic direction, customer service, data governance, service excellence and performance management across both central and federated IT units.
- **IT Finance** - enables Mason IT's ability to sustain appropriate funding to facilitate the long-term delivery of quality services and align funding sources (e.g., chargebacks and technology fees) with the true cost of delivering services across the campus
- **IT Talent** - enhances Mason's current talent management practices to enable the ability to remain competitive in the market, attract and retain top talent, and improve overall career satisfaction
- **Technology Capabilities** - develop a common perspective for the future of technology enabling Mason to modernize current infrastructure, remain ahead of the evolving technological curve, and satisfy the immediate and future needs of the campus
- **IT Security** - enhances controls and infrastructure in place to protect information against cyber threats and vulnerabilities, contributing to operational efficiency and cost effectiveness across the campus
- **IT Service Management** - enables the ability to continually evaluate and improve service delivery practices with clearly defined, measurable, and relevant metrics and to support effective and efficient delivery of the right mix of services

This framework can be tailored according to an effort's specific focus areas, aligned to the defined project goals and rooted in collaboration. In turn, it will allow Mason to apply best practices to GGU issues and dive into the right areas of analysis and solution development to realize benefits support Mason's mission. For our operational assessments, we propose a three-phased approach consisting of the following: Current State Assessment, Future State Design and Implementation Roadmap. As depicted in the diagram below, these phases map to the identified scope our IT Transformation Framework and will be executed for each of the six (6) assessment areas described above. Moreover, each of the phases will culminate in work-products for Mason



review that will inform the final deliverable and presentations to Mason project leaders and stakeholder. This process will provide a timely, cost-effective and high-quality process that ramps up quickly to achieve the project objectives. Given our extensive experience assessing current states, developing consolidation strategies, implementation roadmaps and designing operating models for universities, we will be able to hit the ground running from Day One. We will have a clear vision of the structure of the final work products and deliverables, the methodology, tools and techniques required to conduct the analysis, and a team that is prepared through direct relevant experience. The three-phased approach and the six assessment areas are depicted

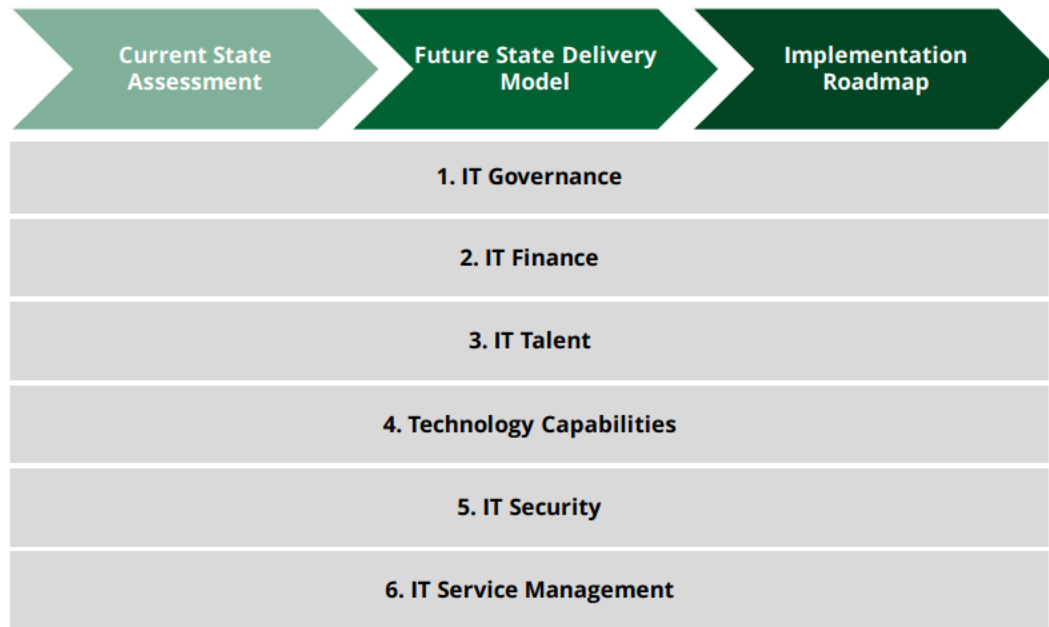


Figure 3 – IT Assessment Phases and Focus Areas

- Current State Assessment will focus on understanding the current state of each area in scope through interviews with appropriate IT stakeholders identified across University departments and administrative units (e.g., executives, administrators, faculty, researchers and students), analysis of operational metrics and detailed documentation reviews.
- Future State Delivery Model will use findings from the Current State Assessment phase to enable the definition of a recommended future state as well as for the identification of opportunities for improvement and efficiencies.
- Recommendations and Implementation Roadmap will focus on providing options and a series of recommendations to enable Mason to bridge gaps between the current state and the future state vision and help Mason achieve the desired end state of operating model transformation via a comprehensive action plan.

#### *Business Process Improvements*

Deloitte is uniquely positioned to team with Mason in support of any business process improvement (BPI) work. We have deep business process improvement (BPI) expertise, tools, methods, and decades of Higher Education experience.

Additionally, we have an in depth understanding of the role and opportunities related to emerging technology capabilities, allowing us to successfully perform the modernization and the enhancement of existing processes.

There are several key factors that aid in our successful BPI include:



- A repository of leading process design methods, tools, and accelerators, which have been used in hundreds of similar transformation projects for Higher Education clients
- Deep industry knowledge and experience, honed over decades of serving University clients, enabling leverage of industry trends and leading practices to identify improvements and design future state processes

The figure below depicts key value drivers for Business Process Redesign (BPR) along with their respective benefits.

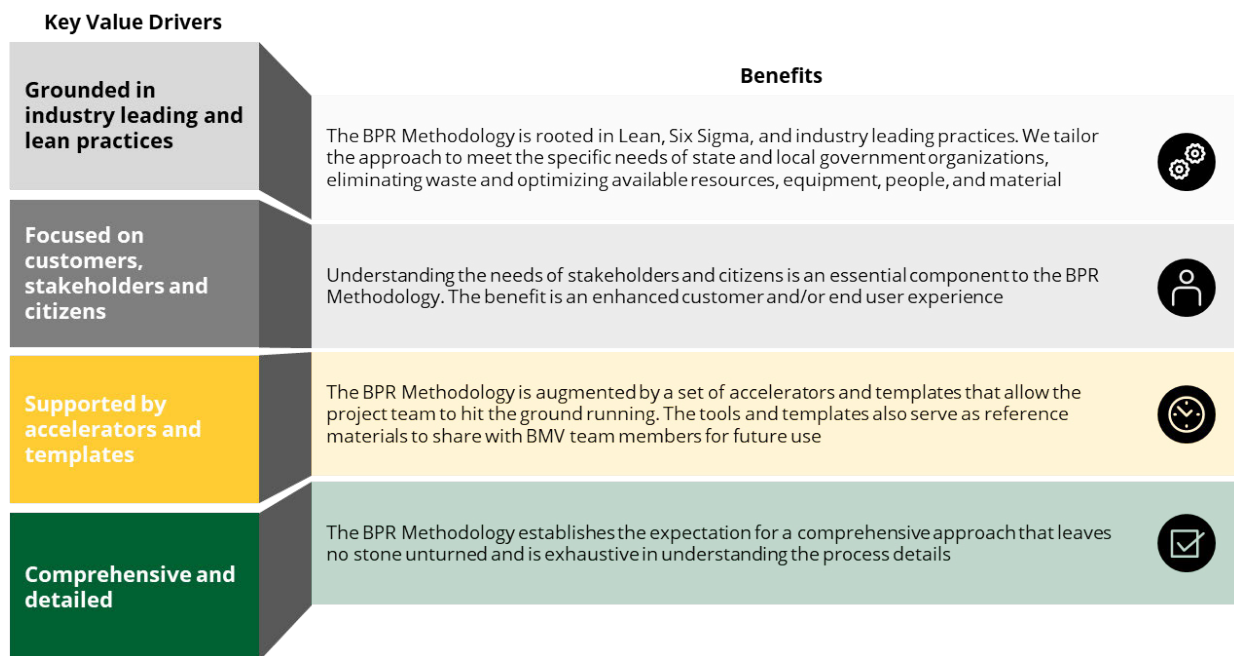


Figure 4 - Business Process Redesign (BPR) Value Drivers and Benefits

The rigor of our approach plus the breadth of our experience makes Deloitte a valuable partner for Mason in identifying process improvement opportunities and in re-engineering current business processes and technology to achieve consistent and accurate processing, to comply fully with all business and technical requirements, and to align with industry leading practices.

These capabilities were leveraged recently at a top five **Ivy League institution** where the Deloitte team conducted business process redesign activities to support an enhanced and streamlined customer experience and implementation of a single service portal for several University functional offices including finance & treasury, graduate school services, environmental health & safety, and University services. Deloitte established a unified approach for service delivery at the institution by redesigning business processes, capturing user experience priorities and business requirements, supporting service portal design, and developing and delivering training / communications. The team conducted current state and future state process flow sessions for multiple processes, enabling the client to clearly identify which pain points would be solved for in the future. Deloitte workstreams provided an individualized approach to each functional group, allowing them to truly reevaluate their processes and envision how the new service portal could enable an improved customer experience. This approach to business process redesign meant that technology would ultimately work as an enabler for service improvement.

The service portal and redesigned processes went live in April 2020, shortly after the world went into quarantine. Through this project, the University was able to streamline service operations and improve the



stakeholder experience (staff, faculty and student) by extending enhanced service management processes to several administrative functions on campus and providing a platform for better virtual support of customers.

Our BPI Methodology, as summarized below, is composed of three integrated phases used to execute business process reengineering projects. These phases consist of “Scope, Vision, and Plan,” “Current State Assessment,” and “Future State Design.” Each phase builds on the prior phase and allows for a smooth transition of findings and knowledge between the phases.

The three integrated phases ensure that our BPI are conducted both efficiently and effectively. In the “Scope, Vision, and Plan” phase, the business process redesign (BPR) vision and goals are defined with the help of project leadership. Additionally, a list of in-scope processes and transactions, a detailed approach and schedule for project objectives, and an established project management structure are all developed to create an approved transaction list. Next, the “Current State Assessment” phase entailing the review, documentation, and analyses of processes, the leveraging of both internal and stakeholder views on challenges and gaps, and the potential areas of improvements is conducted to create an As-is Business Process Map & Inventory. Lastly, a “Future State Design” is performed. In this phase, the To-be Business Process Maps are created based on industry leading practices and improvement opportunities identified based on the prior assessment.

The baseline prints will also serve as a framework to jump-start future-state design workshops for Mason, enabling our team to leverage existing content to build upon.

#### *Benchmarking*

For nearly all the University clients listed in the [experience table above](#), we have conducted benchmarking of their IT operations, identifying leading practices from across industry and similar research institutions to provide the institutions with a set of possibilities to address their biggest challenges.



As highlighted above, our team has a proven methodology that combines research and insights gained from actual project experience with hundreds of organizations as well as industry benchmarks from organizations such as Educause, Gartner, Computer Economics, etc. In fact, Deloitte has its own benchmarking practice focused on developing and delivering data-driven benchmarking insights to our clients: The Global Benchmarking Center (GBC). The GBC operates as a center-of-excellence within Deloitte that provide executives with relevant peer comparisons that measure cost effectiveness and support investment decisions. Their core strength is to provide benchmarking insights through data, tools, and specialized staff for actionable and informed decision-making. The GBC supports hundreds of projects each year by providing proprietary industry or cross-industry data for client comparison along with access to public tools and resources and custom peer



group development based on a client's unique operating demographics. A sample output of the benchmarking analysis is spotlighted here.

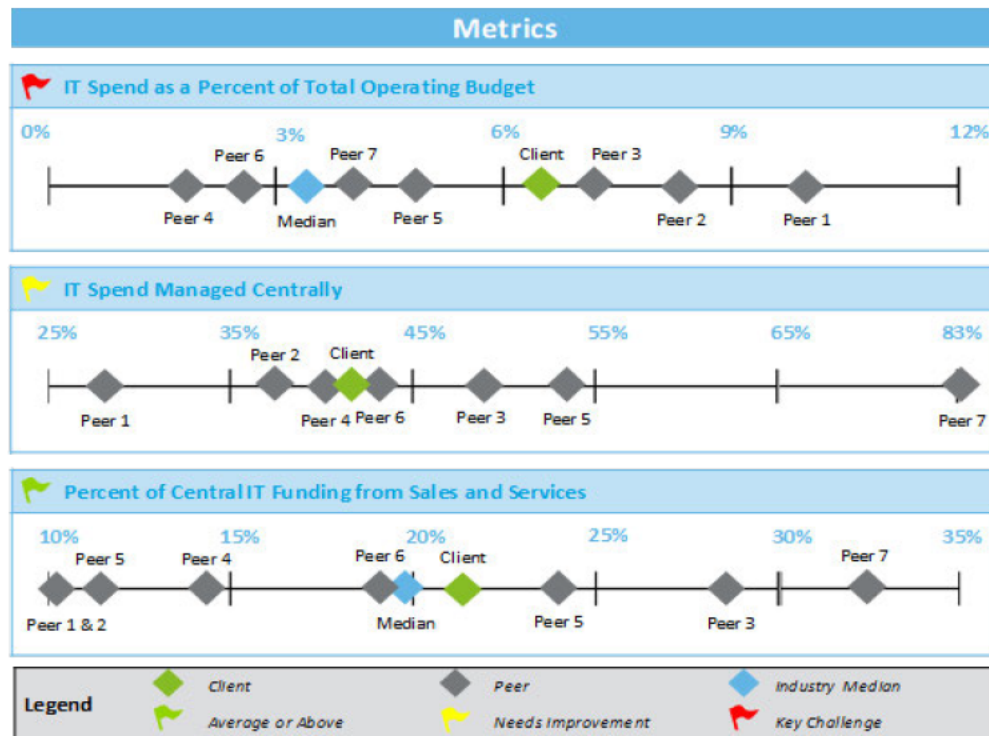


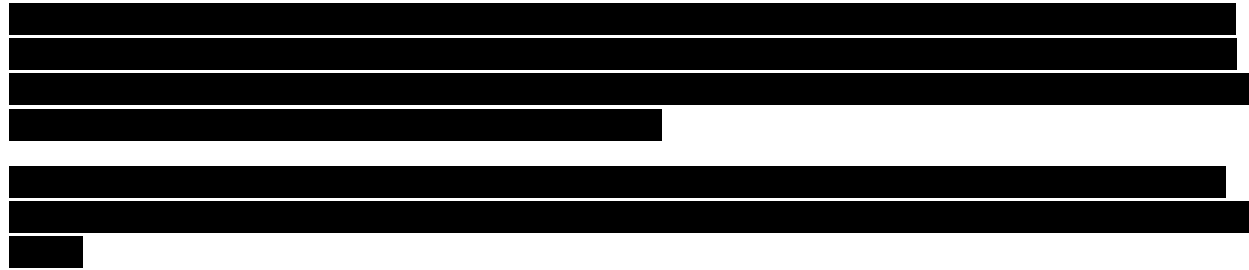
Figure 5 - Sample Benchmarking Output

Deloitte's leading IT benchmarking capabilities are organized by Deloitte's IT taxonomy, standard process and metric definitions. This structured approach enables consistent, relevant peer comparisons across collected client data. Illustrative benchmarks across several domains are provided below.

Domain	Sample Benchmarks
<b>IT Governance</b>	<ul style="list-style-type: none"> <li>Percent of institutions with CIO reporting to CFO/ President/ Provost</li> </ul>
<b>IT Finance</b>	<ul style="list-style-type: none"> <li>Total IT spend as a percent of total operating budget</li> <li>IT spend managed centrally</li> <li>Percent of central IT funding from chargebacks</li> </ul>
<b>IT Talent</b>	<ul style="list-style-type: none"> <li>Total IT FTE as a percent of total University staff (faculty, staff)</li> <li>Central IT FTE as a percent of total University staff (faculty, staff)</li> <li>Percent of central IT budget allocated to professional development</li> </ul>
<b>Technology Capabilities</b>	<ul style="list-style-type: none"> <li>Number of data centers on campus</li> <li>Number of common IT services owned by central IT</li> <li>Research computing spend as percent of central IT spend</li> </ul>
<b>IT Service Management</b>	<ul style="list-style-type: none"> <li>Number of IT help desks on campus</li> <li>Percentage of users using Voice Over IP</li> </ul>

Table 3 - Illustrative IT Benchmarks





## *IT Strategic Planning*

Deloitte has performed hundreds of engagements to facilitate strategic decision-making with University stakeholders, and we bring the depth and breadth of experience in Higher Education needed to help institutional leadership think strategically, carefully and realistically about the future of their institution. Our services range from strategic plan development across all functional areas – including information technology, enrollment management and more – to finance optimization, process re-engineering, change management, and organizational restructuring. Our value comes from working extensively with institutions that are facing serious challenges for the future, and we will bring that knowledge and experience to Mason as a trusted advisor.

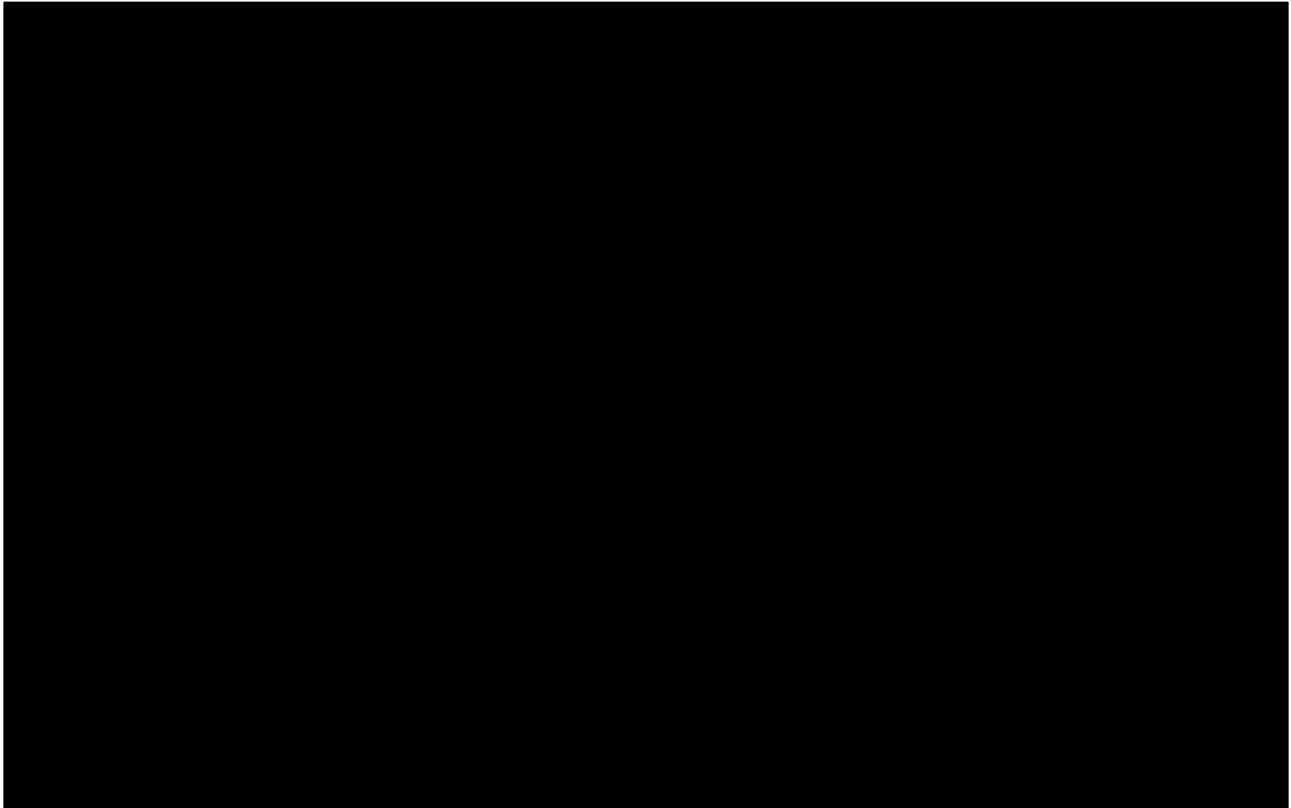
Within Deloitte's Higher Education practice, we define strategy as a set of integrated choices that position universities to create sustainable improvement over time. We work with institutions to understand what choices are most critical for them and craft tailored approaches to help them make these choices and define clear and compelling strategies. The key to this approach is not to merely identify the choices related to critical questions, but also recognize the interrelated nature of those choices.

At a **mid-size, private institution**, Deloitte was engaged to facilitate multiple IT Strategic planning sessions. These sessions were focused on aligning University stakeholders on two interrelated questions that would inform the University's strategic choices: 1) what customers, markets, and program offerings should the University focus on? and 2) how would the University effectively compete or "win" in those segments? Deloitte convened a broad group of stakeholders representing the board of trustees, University administrative leadership, staff, and faculty over multiple sessions to frame possibilities, options paths, and trade-offs from various strategic choices. The sessions enabled disparate stakeholders to engage with one another while also providing input to University leadership on both qualitative and quantitative data to make informed decisions. The Deloitte team documented the outputs from those session along with next steps on further strategic plan



development and implementation. As a result of the effort, the institution experienced broader alignment and clarify on the development of its strategic priorities moving forward.

[REDACTED]



This framework anchors strategic choices and decisions on IT capabilities in relation to a University's overall mission and goals, enabling broader alignment and consensus on decision making rubric and guiding principles and avoiding more procedural and tactical conversations.

We will work with Mason to understand what choices are most critical for you and craft tailored approaches to help the institution make these choices and define clear and compelling strategies. The key to this approach is not to merely identify the choices related to critical questions (illustrated Figure 8), but also recognize the interrelated nature of those choices. In this way, we can identify implications for both upstream and downstream strategic decisions. The strategic choice cascade is shown in the figure below.



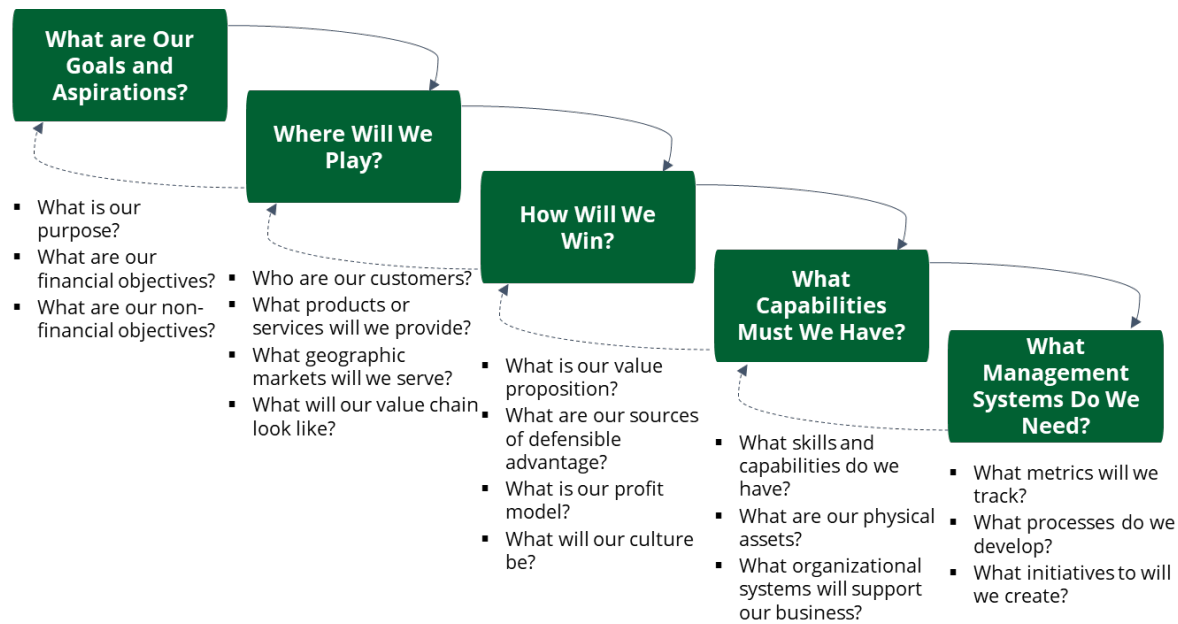


Figure 8 – Strategic Choice Cascade

Our approach is designed to promote achievement of the following objectives:

- Building a common understanding among key stakeholders of areas for continued improvement and focus
- Shaping and exploring different options for how to focus institutional priorities to position Mason for the future
- Making clear choices that are consistent with Mason’s mission / vision and institutional strengths

Developing a clear operational and implementation plan that articulates how Mason will cascade its prioritized initiatives. We are also committed to realizing a seamless connection between strategy and implementation and identifying the organizational implications and execution requirements for success. Too many strategy projects invest heavily in researching “the answer” before working closely with the client, resulting in a strategy that feels “imposed” and has weak or no organizational alignment and support. As part of our approach to this engagement, our team will conduct interviews and focus groups with Mason’s leadership, faculty and staff, including key technology “customers” to build out our understanding of Mason’s current state of IT offerings and support ongoing communications to inform engagement leadership of the overall process. We will also work with Mason’s project team to identify how best to re-engage these groups for future state development. It is vital to us to involve Mason leadership and stakeholders throughout the community to build collaborative relationships and foster an atmosphere of collegiality, mutual respect, and trust so that our efforts are focused on your most critical questions and aligned with your core values.

#### *Implementation Services Including Technical Change Management*

Deloitte is unique in the marketplace because we provide strategy, operations, and implementation services. This means that we are often asked to implement the recommendations that we co-develop with our clients, giving us a great amount of experience seeing transformation from start to finish. We will leverage this experience for Mason, but also work closely with your team to align to any existing standards or processes in place, especially as it relates to Technical Change Management and any change control practices and governance structures (e.g. a Change Control Board) that are in place.



Our experience with multiple Higher Education institutions has shown that regardless of the unique challenges faced by an organization there is a set of best practices to facilitate a successful implementation of initiatives to achieve transformation towards the envisioned future state.



Deloitte has a holistic approach which encompasses the major disciplines of implementing many types of processes and technology solutions. We often start with the framework below for the implementation of technical solutions. Below is a graphic illustrating a sample implementation approach.

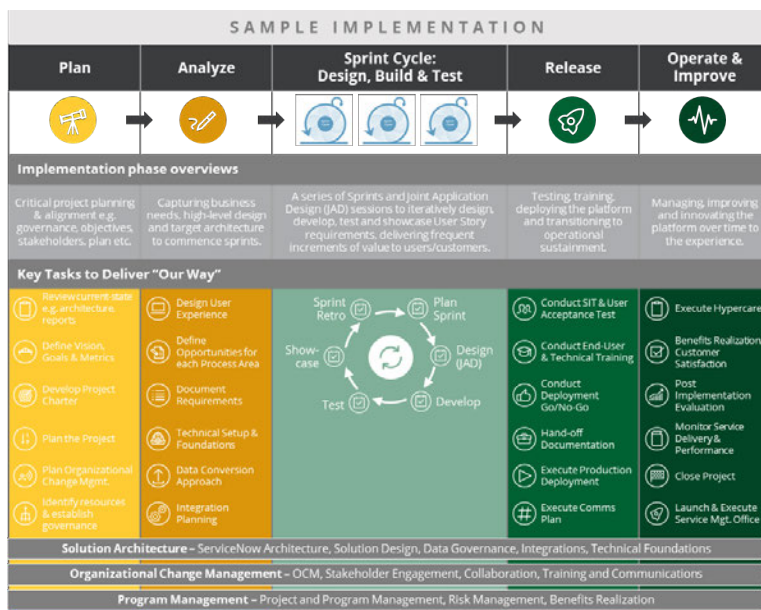


Figure 9 – Sample Implementation Methodology



Below are the phases identified above related to our implementation approach:

- **Plan:** Track contracted tasks and deliverables. Identify and mitigate risks as they arise. Formalize the review process and project assumptions. Define our contractor responsibilities and management processes. State how we will meet the task and deliverable requirements listed in the SOW. Describe how we will comply with all other functional and technical procedures.
- **Analyze:** Facilitate sessions with key stakeholders to understand responsibilities, requirements, journeys to develop high-level design and target architecture to commence sprints.
- **Sprint Cycles:** Create the customer experiences envisioned by the customer through building, validating, rehearsing, and deploying the solution.
- **Release:** Conduct deployment to production with approval. Conduct deployment activities and smoke test during deployment windows. Quickly respond to any technical, process, or data issues encountered. Begin to migrate to standard support/maintenance once release has completed
- **Operate & Improve:** Support, sustain, and continually evolve customer experiences through the new solution.
  - **Technical Change Management:** We work iteratively with our clients to establish the appropriate change control processes to facilitate appropriate approvals, oversight, and implementation of changes to any solutions in production. Often, this means establishing a Change Advisory Board and associated process for change identification, categorization, review, approval, implementation, and monitoring. For Mason, we will follow any existing processes and standards in place.

## Enterprise Applications Services (RFP Section XI.1.a.ii)

We deliver **Enterprise Applications Services** by drawing on capabilities and offerings from several areas of our practice. The table below outlines some types of services that Deloitte can provide for George Mason University as requested in the RFP.

Enterprise Applications Services	Experience?	Description
Programming	✓	<ul style="list-style-type: none"> <li>Leverage experience in programming languages for many of the most common use cases including web development, application development, systems programming and more</li> </ul>
Business Analysis	✓	<ul style="list-style-type: none"> <li>Review of applications and services across divisions, analysis of where they are and how they function across the organization, and recommendations for process improvement or future state</li> </ul>
Software Solutions Architecture	✓	<ul style="list-style-type: none"> <li>Lead with business architecture and technology capabilities to design, build and scale integration solutions</li> </ul>
Enterprise Resource Planning Analysis and Development	✓	<ul style="list-style-type: none"> <li>Plan, analyze, and develop a system of existing or newly developed resources that can be used to effectively communicate and bring together core business processes of the organization</li> </ul>
Salesforce Development	✓	<ul style="list-style-type: none"> <li>Analyze, develop, and create custom, scalable processes and solutions for specific business needs that gives a single, shared view of every department across the organization</li> </ul>



Enterprise Applications Services	Experience?	Description
Database Administration	✓	<ul style="list-style-type: none"> <li>Create innovative solutions that secure business data, empower users, and promote the longevity of data usage</li> </ul>
Website Development	✓	<ul style="list-style-type: none"> <li>Build well-designed front-end, customer-facing portal that performs efficiently and effectively with a seamless user experience</li> </ul>

Table 4 – Enterprise Application Services

Addressing Mason’s requirements as defined in the RFP requires a multidisciplinary team with the prerequisite industry, functional, and technical experience spanning Higher Education and information technology. We have significant experience across both and can provide the deep experience on governance, people, business processes, and technology. We will approach each of these technological services and projects for Mason from the vantage point of serving the Higher Education industry and understanding the academic mission.

Institutions of Higher Education face ongoing challenges, including skyrocketing costs, intense competition, increased government regulation coupled with less public funding, and an unpredictable economy. Colleges and universities select Deloitte because of the depth and breadth of resources and experiences we bring to assist our Higher Education clients in addressing these challenges.

For various Higher Education clients, we have:

- Implemented Large Applications – Oracle, Workday, SAP – on premise and in the Cloud
- Designed and implemented custom applications
- Designed and implemented mobile applications
- Established Analytics
- Redesigned IT Support Services
- Established IT Governance

Deloitte has extensive experience supporting universities in their efforts to improve efficiency and transform their organizations. Our firm’s qualifications, background, and experience position us to deliver results. We will draw upon the experiences gained and lessons learned at other institutions to help George Mason University achieve its desired outcomes.

Deloitte understands Mason is looking to utilize enterprise application services and solutions to drive efficiencies, process improvements, and to support future growth and operational excellence. As your implementation partner, Deloitte brings unmatched experience in Programming, Business Analysis, Software Solutions Architecture, and Enterprise Resource Planning, deep technical knowledge of Salesforce, database administration and website development, and Higher Education experience that uniquely position us to bring the right mix of capabilities, experience, tools and accelerators to deliver on your project goals.



## Accolades

- Deloitte named a global leader in Public Cloud Infrastructure Professional and Managed Services based on completeness of vision and ability to execute by Gartner, February 2019
- Deloitte named a worldwide leader in IT Service Management Implementation based in capability and strategy by IDC, February 2019
- Deloitte named the undisputed global leader in IT Operations Consulting based on breadth and depth of capabilities by ALM Intelligence, 2018
- Deloitte named a global visionary in Application Testing Services based on completeness of vision and ability to execute by Gartner, November 2018
- Deloitte named a global leader in Oracle Services based on current offering and strategy by Forrester, October 2018
- Deloitte named a global leader in SAP Application Services based on completeness of vision and ability to execute by Gartner, February 2018
- Deloitte named a global leader in Oracle Application Services based on completeness of vision and ability to execute by Gartner, February 2018

Table 5 – Deloitte’s Enterprise Applications Accolades

Deloitte collaborates with many of the world’s leading technology companies to help business leaders design and implement solutions to achieve their goals. Through our alliance relationships, we extend our reach and strengthen value for the clients we serve and for the technology companies we align with around the world.

The figure below highlights a sample of the product and vendor relationships Deloitte collectively holds:



Figure 10 – Deloitte’s Product and Vendor Relationships

We bring the power of our vendor ecosystem and experiences to Mason in assessing, designing and implementing solutions. Deloitte develops and maintains strong market alliances and relationships with all the leading CSPs. These relationships provide Deloitte with go-to-market support, training and certifications for delivery staff, and advanced engineering support to address client problems.

### Programming

We are well prepared to work with Mason to create custom solutions, bringing decades of experience developing applications and systems tailored to clients’ needs. We have a deep knowledge of cloud-based solutions, various programming languages, and how to modernize legacy systems while maintaining smooth



integrations and data integrity. In addition, Deloitte brings in rich experience developing HTML5, SAP UI5 applications and Extensions and deploying them on the SAP Cloud Platform to integrate with SAP.

[REDACTED]

[REDACTED]

[REDACTED]

## *Business Analysis*

Deloitte has extensive experience in supporting detailed business analysis of existing systems, processes, integrations and/or data flows. We have worked with clients from the highest levels of strategy through to very focused issue resolution in applications, data management and infrastructure. We can help Mason maximize its technology investments through introducing efficiency into current operations and identifying new solutions to allow for growth and improvement as Mason evolves.

[REDACTED]



## *Software Solutions Architecture*

Deloitte will provide Mason with access to a deep and broad range of experience across multiple technology platforms. The appropriate level of design specialty can be brought to bear at the right time in the overall SDLC. Our pools of specialists in each area are constantly in communication so Mason will gain the benefit of that pooled experience.

At an ongoing engagement, Deloitte is overhauling a **large state agency's** existing sales tax platform for internal and external users. The agency was using a clunky, outdated online application to collect tax payments from businesses across the state and the agency's Help Desk was fielding numerous requests due to poor user experience and performance. Deloitte has worked with the agency since early 2019 to research, develop, and deliver a modernized solution where business owners can file and pay their tax returns. As one of the largest states in the country, the sales tax platform manages over 2 million users and the new system can process up to 15,000 returns at a time. The Deloitte team has integrated with existing technologies to ensure that the new interface communicates seamlessly. As the scope of this project is limited to building a system auxiliary to the agency's mainframe database, Deloitte developers fit the new solution architecture to the needs of the client. The project follows an Agile Scrum Development model with regular communication and updates with the client. The Deloitte team has also leveraged relationships and partnerships with OpenShift RedHat and MuleSoft for development and implementation.

## *Enterprise Resource Planning (ERP) Analysis and Development*

Deloitte has successfully performed well over 100 ERP selection engagements in the past five years across every industry, including Higher Education. These projects include software assessment, business cases, roadmaps and developing solution proof of concepts. Our collective experience includes:

- Over 30 Higher Education clients for administrative system(s) assessments and/or selections. Assessments include human capital management (HCM), finance, and student in various combinations.
- Over 25 Higher Education clients leading administrative systems negotiations with vendors including Campus Management, Ellucian, Oracle, and Workday.
- Over 100 Higher Education clients in a research and advisory capacity to inform ERP processes including selections, contract reviews, and vendor analysis.

Deloitte is certified to implement a wide range of ERP products. Deloitte is a Workday certified partner with over 1,750 Workday certified consultants that hold over 3,748 certifications that cover all current Workday ERP products. Neither Oracle nor Ellucian require certification, however Deloitte does have over 26,000 Oracle ERP practitioners. For SAP, Deloitte is a Global Strategic Services Partner, the leading level of partnership with SAP. Deloitte has more than 23,000 dedicated SAP practitioners worldwide with 70% officially certified with SAP.

- Workday: From 2016-2019, Deloitte has completed over 160 implementations of Workday HCM, Finance and as of February 2020, Workday Student. Eleven Deloitte-led Workday implementations across Higher Education are live or in progress since 2016.
- Oracle: Deloitte provides Oracle implementation services covering multiple sectors and industries globally, including Higher Education. Between 2016 and 2019, Deloitte implemented over 100 Oracle ERP Cloud solutions.
- Ellucian Banner: Ellucian has a closed ecosystem of system partners, therefore Deloitte's involvement with Ellucian implementations is not as extensive as our Oracle, SAP and Workday practice. However, in recent years Ellucian has been more open to partnering with systems implementors [REDACTED]  
[REDACTED]  
[REDACTED]
- SAP: With more than 7,000 SAP implementations completed in the last 10 years alone, our SAP practice is one of the largest and most experienced SAP consulting practices in the marketplace. Additionally, we have led over 125 assessment projects, including business cases, roadmaps and developing



solution proof of concepts. From 2016 through 2019 Deloitte has completed approximately 216 SAP S/4HANA implementation projects with 147 currently live.

[REDACTED]

[REDACTED]

#### *Salesforce Development*

Deloitte and Salesforce have a thriving strategic alliance (that includes go-to-market and delivery for Higher Education and healthcare) that has assisted more than 500 clients, globally. As an acknowledgment of the client impact we generate, Salesforce has named Deloitte a Global Strategic Partner. We have rich experience in developing and implementing Salesforce to provide positive user experience for students, and faculty members, by enabling Salesforce technologies as well as to establish consistent operations across multiple business units.

[REDACTED]

#### *Database Administration*

Our award-winning SAP practice includes more than 18,000 dedicated SAP practitioners worldwide with over 50% of our SAP consultants having more than 10 years of experience. What this means for Mason is that we can provide the trusted experience, resources, and knowledge transfer that will enable your institution to design and implement solutions that work for you. We are proud of our Tier 1 Global Alliance with SAP since 1989 and our successful track record of SAP systems and implementations worldwide. We have a reputation for



delivering successful, business-driven implementations that mitigate risk.



Figure 11 – Deloitte's IT Capabilities with SAP

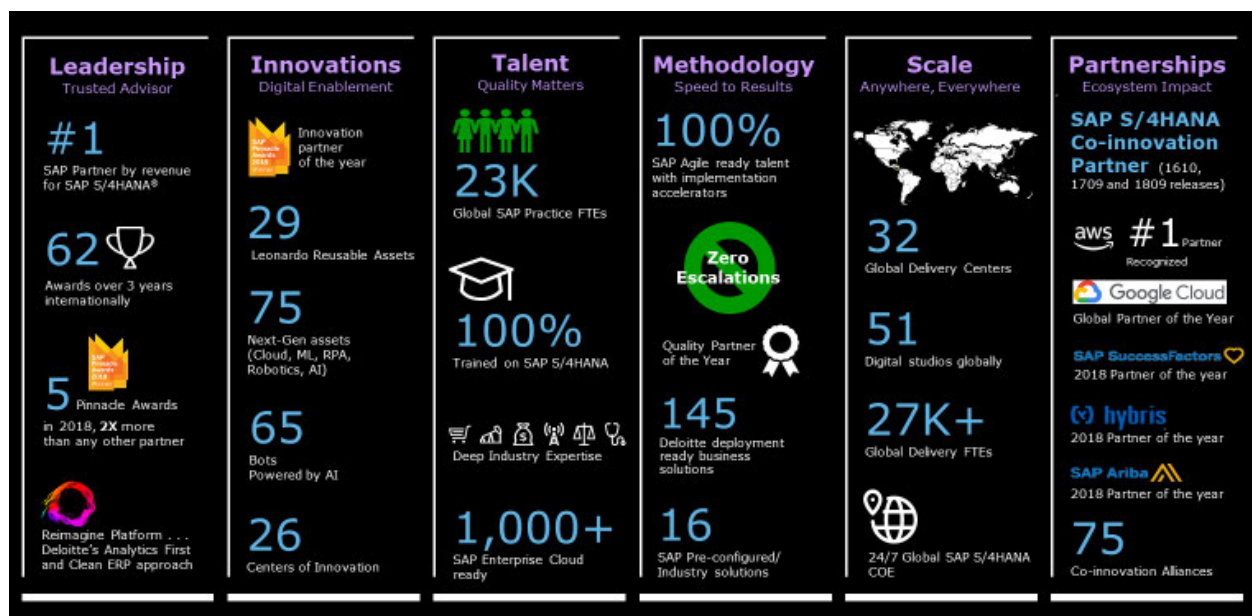


Figure 12 – Deloitte's Global Alliance with SAP

Deloitte is also the leader in SAP with four key differentiators in the marketplace.

1. **Involved with SAP S/4HANA ahead of its general release:** Leader in SAP S/4HANA Finance and early implementer of IBP



2. **We have an award-winning SAP practice:** 2018 SAP Hybris Partner Award – Global Partner of the Year, 2017 SAP Pinnacle Awards SAP S/4HANA Partner of the Year – Large Enterprise Companies, SAP EMEA/MEE Service Partner Excellence Award 2017 for SAP HANA Cloud Platform, 2017 SAP Partner Excellence Award for SAP S/4HANA, 4 SAP Pinnacle Award in 2018 including SAP Leonardo Partner of the Year 2018

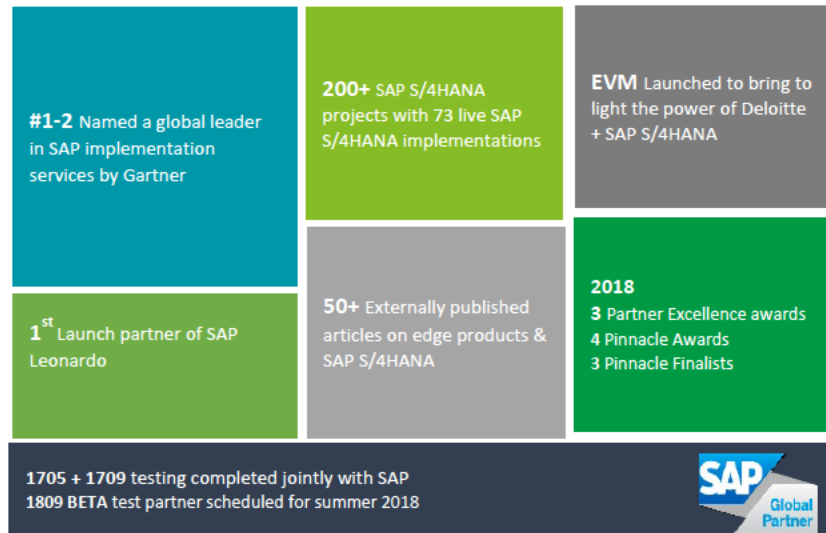


Figure 13 – Deloitte's SAP Differentiators

4. **The investments we make:** Our 13 pre-configured solutions, which cover both industries and capabilities; our testing, as we engage with SAP to test new technologies before they are released; our SAP Single Stack solution, which brings higher efficiencies to our clients; and our technologies, as we have worked with multiple partners to develop the most up to date and efficient integration.

Deloitte has supported many product development and testing activities with SAP.

The Deloitte Oracle Offering has industry-leading experiences across Oracle products and solutions. We bring value to our clients through understanding the intersection of business and technology, while bringing our clients industry specific preconfigured solutions to accelerate delivery and return on their investments. We're recognized as thought leaders in industry and as a Global Cloud Elite partner. Our clients affirm our position by sharing their stories of success in partnering with Deloitte and the Oracle practice.

Elevate is a strategic collaboration between Deloitte and Oracle Consulting that puts modern, industry-leading cloud infrastructure within reach for companies of all sizes, creating opportunities for innovation, acceleration, and growth. Elevate focuses on accelerating innovation by rapidly migrating and managing workloads with Oracle Autonomous Database and Oracle Cloud Infrastructure. Elevate brings together the two organizations' insights and experience enabling customers to drive and optimize enterprise operations in the cloud while maximizing current Oracle investments.

Deloitte's EVD for Oracle method provides a complete set of processes, templates, and accelerators to meet Mason's project needs. It provides a comprehensive system development life cycle (SDLC) approach that combines flexible, reusable service-oriented capabilities, technical frameworks, tools, accelerators, and Deloitte's extensive experience developing solutions over the past decades in the Higher Education space.

Our method is based on the CMMI® Institute's CMMI (a world-class performance improvement model) and Project Management Body of Knowledge (PMBOK) and supports all activities that are executed during the project life cycle. It has an extendable framework that can be customized for specific organizations and projects, and it incorporates a scalable architecture that provides a starting point to adapt and deploy a highly flexible and reliable system with ease of maintenance. Our method is configurable in that it is designed to serve



environments of varying scales and can be tailored to support industry-specific needs. It also leverages existing assets that can accelerate the development and deployment of Mason, reducing time and project risk.

In addition to these core database platforms, Deloitte resources have experience in various other database platforms such as MySQL, Sybase, MongoDB, PostgreSQL, and cloud-based database platforms such as Elasticsearch and Redis.

## *Website Development*

In addition to deep experience and resources in Deloitte's Higher Education practice, we have robust resources across the firm serving commercial clients as well as state, local, and federal agencies. Deloitte has invested in Global Digital Application Studios (GDAS) to develop and operate high-value and customer-focused applications services. The Studios deliver technical delivery standards, frameworks, and tools and ensure state-of-the-art services development and maintenance. Among the seven Communities of Practice under GDAS are focus areas necessary for successful website development: Analytics, DevSecOps, Innovation, Solution Engineering, and User Experience. These Communities of Practice have teams and leaders ready to mobilize and support client projects. Deloitte staff have the proven ability to move between sectors and be adaptable to the needs of the client, particularly for technical projects related to software solutions architecture, programming, and website development.

Our firm has demonstrated skill with website development across our practices. The State of Texas saw that its online users needed a centralized portal to access state agencies like the DMV and services like professional licensing. An ongoing Deloitte Digital engagement with the State of Texas has produced Texas.gov, a one-stop-shop site for the various services that many state agencies can offer residents. State governments and their agencies are organized similarly to the decentralized nature of many Higher Education institutions. While there are advantages to a decentralized system, the customer experience can be difficult to navigate when one does not know where to search or which questions to ask. Texas.gov has proven to be a value add for Texans and visitors looking for a streamlined experience.

Our project experiences and qualifications across all sectors and industries provide Deloitte with a unique advantage to deliver the value required by our clients. This combined with our Higher Education experience, means that our supporting methods and toolsets for executing projects are extensive and allow for efficient customization to the specific context at Mason. We have applied and tailored our approach successfully for a vast array of Higher Education clients.

## **Enterprise Infrastructure Services (RFP Section XI.1.a.iii)**

We deliver **Enterprise Infrastructure Services** by drawing on capabilities and offerings from several areas of our practice. The table below outlines some types of services that Deloitte can provide for Mason as requested in the RFP.

Enterprise Infrastructure Services	Experience?	Description
<b>Cisco Network and Connectivity Technologies</b>	✓	<ul style="list-style-type: none"> <li>Provide network solutions and connections between all the points in the networking ecosystem, such as sensors, gateways, routers, applications, platforms and other systems</li> </ul>
<b>Microsoft Enterprise Support Services</b>	✓	<ul style="list-style-type: none"> <li>Provide end-to-end support of the organization's entire platform, including mission-critical customer and partner applications</li> </ul>



Enterprise Infrastructure Services	Experience?	Description
Virtualization	✓	<ul style="list-style-type: none"> <li>Utilize capability of running multiple operating systems and applications on a single server to improve overall application performance by balancing resources and providing only what the user needs</li> </ul>
Cloud Architecture and Engineering	✓	<ul style="list-style-type: none"> <li>Utilize concepts and applications of cloud computing such as cloud storage, framework and algorithms for cloud structures, cloud database systems, and more</li> </ul>
Systems Administration	✓	<ul style="list-style-type: none"> <li>Support IT systems and infrastructure that encompasses from server support to operating system management</li> </ul>
Voice and Video Collaboration	✓	<ul style="list-style-type: none"> <li>Strategize and implement communication tools that integrate with existing workflows and promote new approaches to productivity</li> </ul>

Table 6 – Enterprise Infrastructure Services

For more than 100 years, clients have relied on Deloitte LLP for solutions to their ever-changing needs. We are a national and global leader today because we have sustained our clients' trust and exceeded their expectations throughout our history.

**Deloitte is proud to be rated leader in the 2020 Gartner Magic Quadrant for Public Cloud Infrastructure Professional and Managed services Worldwide.** Our consulting group has been leading the industry, supporting clients with large scale change programs and complex transformations. Most relevant to our proposal to George Mason University is our IT consulting practice which is a leader in Strategy, Transformation, and Operations with the scale and breadth of experts for any initiative on the CIO agenda. For the sixth consecutive year, top analyst and research firms have recognized Deloitte with prominent accolades for its depth and breadth with Consulting services.

Deloitte enterprise and cloud professionals assist clients identify and solve their most urgent infrastructure and technological challenges. We are recognized in the marketplace for our capabilities in infrastructure design and implementation, particularly end-to-end IT Transformation, Cisco and Arista network and connectivity technologies, Microsoft Enterprise Support Services, Virtualization, Cloud Architecture and Engineering, Systems Administration, and Voice and Video Collaboration.



Accolades	
<ul style="list-style-type: none"> <li>• Deloitte positioned in Leader's Category in Cloud Professional Services by IDC, 2020</li> <li>• Deloitte named leader in Cloud Professional Services by IDC, 2019</li> <li>• Deloitte named leader in Cloud Professional Services by IDC, 2018</li> <li>• Deloitte named leader in innovation consulting by Forrester, 2018</li> <li>• Deloitte named leader in Cloud Professional Services by IDC, 2017</li> <li>• Deloitte named leader in Cloud Consulting by IDC, 2016</li> <li>• Deloitte named leader in DC Transformation Consulting and Implementation Services by IDC, 2016</li> <li>• Deloitte named leader in Public Cloud Infrastructure by Gartner, 2019</li> </ul>	<ul style="list-style-type: none"> <li>• Deloitte named worldwide leader in Public Cloud infrastructure Professional and Managed Services by Gartner, 2020</li> <li>• Deloitte named leader in Public Cloud and Managed Services by Gartner, 2019</li> <li>• Deloitte named leader in Cloud Professional Services by Gartner, 2018</li> <li>• Deloitte named leader in Enterprise Insight Consulting by Forrester, 2018</li> <li>• Deloitte named in IT infrastructure transformation consulting by ALM, 2018</li> <li>• Deloitte named leader in Cloud Consulting by ALM, 2017</li> <li>• Deloitte named leader in IT infrastructure transformation by ALM, 2015</li> </ul>

Table 7 – Deloitte's Enterprise Infrastructure Accolades

We bring the capability of our vendor relationships with Cisco and Arista and experiences to Mason in evaluating, architecting and implementing Enterprise Infrastructure solutions. Deloitte's strong market alliances and relationships with our leading CSPs, provide Deloitte to deliver our unique value proposition, support, training and certifications for delivery staff, and advanced engineering support to address client problems.

Deloitte, a full-service, global Systems Integrator (SI), has a proven track record of successfully delivering value-based IT transformation enabling organizations to become more innovative and Agile in the face of unprecedented shifts in technology while designing and deploying solutions such as Cisco and Arista to enable a competitive advantage within the marketplace. Deloitte is well qualified to be an independent service aggregator and transformation partner for Mason.



The illustration below highlights Deloitte's Cloud Infrastructure and Engineering Practice:

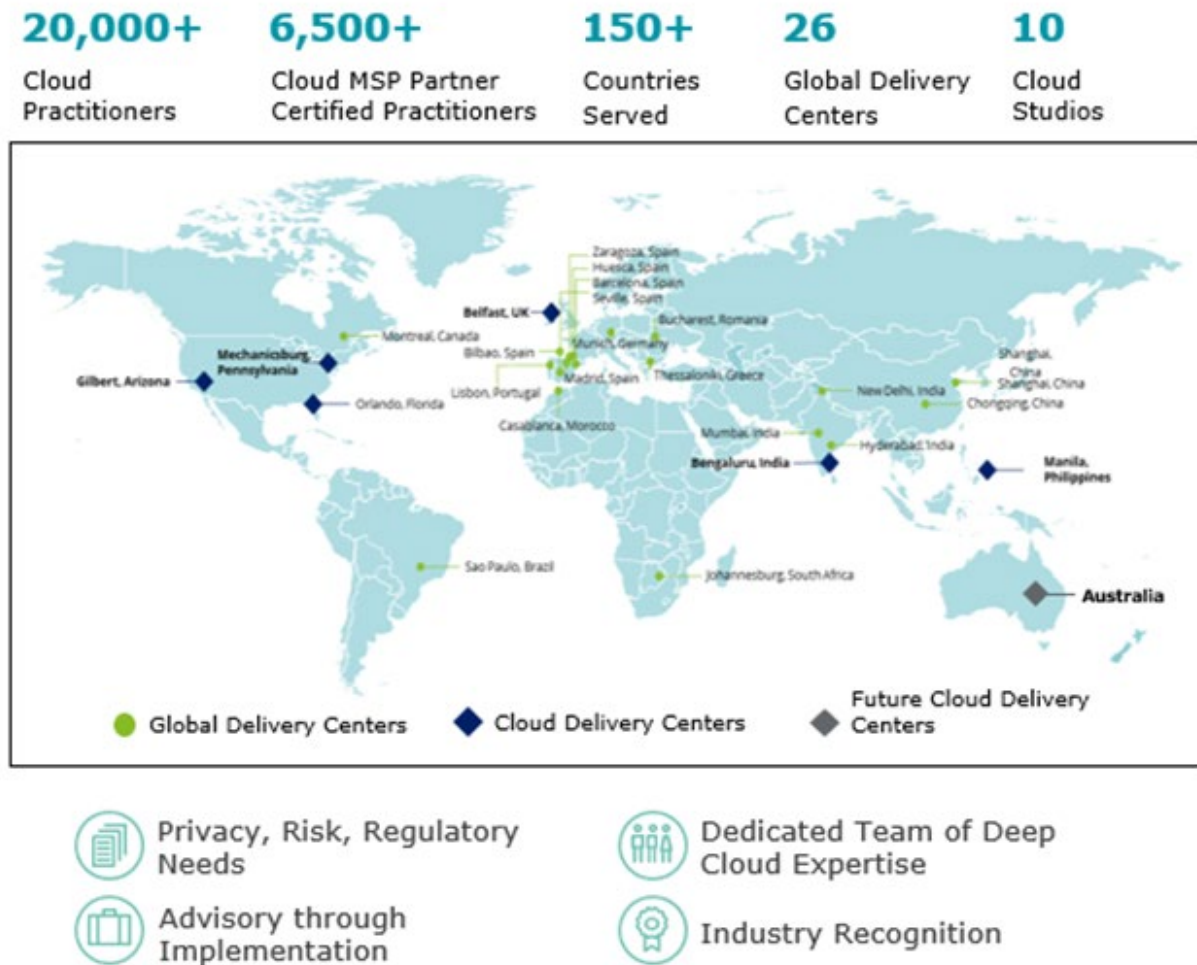


Figure 14 – Deloitte's Cloud Infrastructure and Engineering Practice Overview

As a leader in the Higher Education space, Deloitte has solved complex problems on over 900 projects with public and private Higher Education institutions nationwide. Deloitte's Higher Education team has experienced professionals and industry leaders that turn ideas into impact for your institution. Deloitte brings a strong understanding of the unique Higher Education constituent engagement challenges faced by colleges and universities and has served 22 of the top 25 universities in the US.

Deloitte recognizes Mason is looking for a technology partner with the skilled resources and experience in Higher Education to present solutions to the most technically challenged problems. As your integration and transformation partner, Deloitte brings unparalleled experience in Network Infrastructure, Microsoft Enterprise Support Services, Virtualization, Cloud Architecture and Engineering, Systems Administration and Voice and Video Collaboration, Higher Education experience that positions us to deliver Mason a partner with the experience, and capabilities to achieve your project goals.

#### *Network and Connectivity Technologies*

Networking has evolved over the past several years to include hybrid-and-multi-cloud architecture, containerization, automation, and borderless connectivity. Network security constructs that can be automated, compartmentalized, and shipped transparently across networks fabrics is no longer a dream – it's a reality.



[REDACTED]

We recently worked with a leading university in California to conduct a network and security assessment that highlighted client's need to undergo a modernization to address gaps in securing their sensitive data. Our findings resulting in a transformation of their PCI and HIPAA-protected networks, including the design and migration onto new security platforms and deployment of SD-WAN for handling optimized connectivity for critical remote sites. This new architecture provided our client with enhanced visibility, optimized traffic flows, increased reliability, and improved user experience for Students, Faculty, Advisors, and Staff.

Deloitte is currently engaged with the nation's second largest health insurance provider, advising and designing large scale network architectures that involve elaborate DMZs, multi-cloud connectivity, extremely sensitive SLAs, and support for over 100,000 users. We are comfortable working in massive scale environments and believe that many of the same principles apply to University networks.

Deloitte operates the DNET Lab – which is a highly containerized lab environment based in Georgia used for prototyping network designs, validating deployment parameters, and building automation code that we showcase and deliver to clients. Given the opportunity, Deloitte will leverage our DNET Lab to mockup portions of the George Mason infrastructure to demonstrate new possibilities in networking and build migration simulations for use during project change control.

In addition to the comp and quals highlighted above, Deloitte is a global partner with HPE Aruba and works closely with Palo Alto and Fortinet to guide network transformations across Higher Education and commercial clients across the United States.

#### *Microsoft Enterprise Support Services*

Over the past 20 years Deloitte and IBM have built a partnership providing a Microsoft Enterprise Support Service model that services our clients with technology leadership, hands-on support services, business experience and industry knowledge. This alliance will help Mason in driving innovation by setting up the right infrastructure and connected systems so that Mason can bring digital solutions to the forefront in today's evolving digital environment and a pathway to digital dominance.

Deloitte demonstrated experience in assisting a client recently that was unable to provide sufficient resources with the current resource knowledgeable and skills for their 24x7x365 Microsoft Support Services. Deloitte was selected for providing Microsoft Enterprise Support Services which consisted of defining service goals and resolution procedures at the outset and provide end-to-end technical guidance, day-to-day support, maintenance, upgrades, ad-hoc requests, reactive and advisory services and troubleshooting and training to the client. Our client experienced benefits from our Microsoft Enterprise Support Services processes through customer satisfaction and reduced the support times which exceeded their end-user Support Services goals.

#### *Virtualization*

Deloitte has partnerships with global Hyperscalers companies such as Dell Technology, AWS and VMware.

[REDACTED]



Deloitte is also a Global SISO Partner of VMware where we work with VMware's technology and business teams in identifying client needs and building technical assets for their needs. A brief overview of our alliance is highlighted below

Deloitte is positioned as one of the strongest Alliance partners for VMware

Deloitte comes with differentiated end to end capabilities in delivering Cloud and VMware based solutions

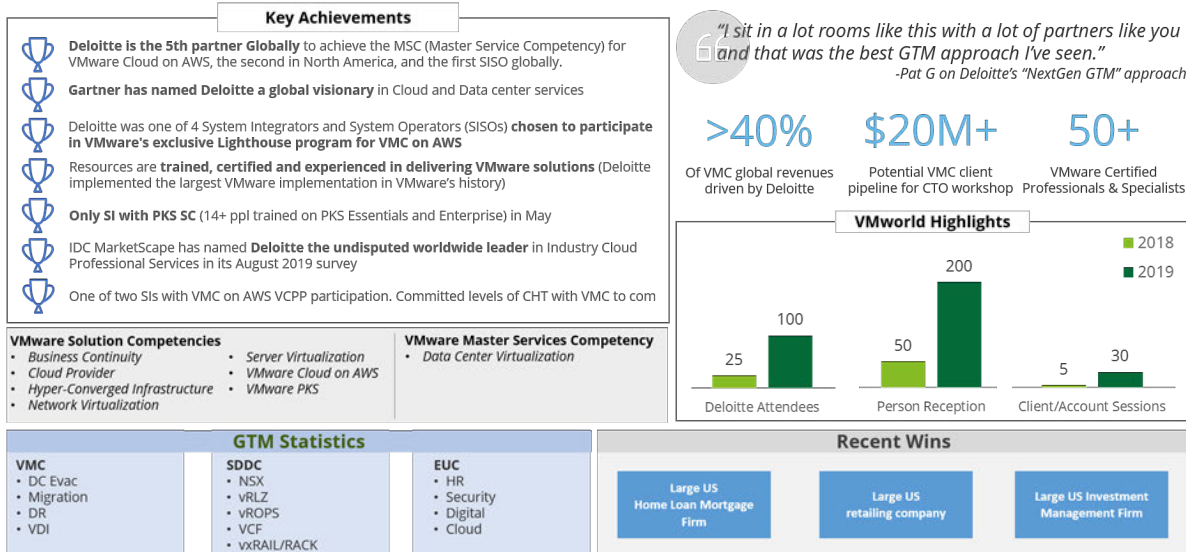


Figure 15 – Deloitte's Alliance with VMware

## Cloud Architecture and Engineering

Deloitte has alliances with Dell, Google Cloud Platform (GCP) and Amazon Web Services (AWS) where we can leverage the power, flexibility, security and innovative and seamlessly integrated solutions of these world-class organizations can provide to Mason.

Deloitte has extensive knowledge and experience architecting and managing on-premises physical and virtual infrastructure, including Dell, EMC and HP. Deloitte has competencies in VMware technologies including Core ESX, vRealize Suite, NSX, VCF, Pivotal Cloud Foundry and VMC on AWS, AVS and GCVE.

Deloitte has performed large scale VMC on AWS migration using VMware HCX platform with little to no downtime. HCX provides the ability to extend the VLANs Layer 2 over Layer 3. The extension of the network helps in faster migration with little to no change in the infrastructure.

Deloitte's partnership with VMware, the global alliance between Deloitte and VMware helps customers achieve successful cloud transformation, regardless of whether they are operating in the public cloud, in a multi-cloud environment, or not in the cloud at all. Deloitte solution engineers and architects are fully certified and trained with a proven track record of deployment to VMware technologies including VMC on AWS.

**Dell named Deloitte VMware Enterprise Partner of the year for Cloud Platform Transformation**

**Deloitte named 2020 Partner enterprise aware for Cloud Platform Transformation**



## AWS, Deloitte, and VMware

Develop and execute NextGen cloud strategies



**Bring the future of cloud computing to your organization**

- Deloitte - **AWS Premier Consulting Partner**, with certified professionals around the globe
- Deloitte enabled **custom solutions** and applications on Amazon Web Services
- Empowered **enterprise transformation** led by Deloitte—the transformation leader
- Leader in **cloud enabled strategy**, business cases, **architectural** designs, and **hybrid cloud implementations**



**Global provider of cloud computing professional services**

- 83%** of the **Fortune 500** companies are utilizing Deloitte's services
- Gartner has named Deloitte a **global visionary** in **cloud and data center** services
- 1 of 4 System Integrators** and System Operators chosen to participate in VMware's exclusive Lighthouse program for VMware Cloud on AWS
- Resources are trained, certified, and experienced in delivering VMware solutions (Deloitte **executed the largest VMware** implementation in VMware's history)



**A cloud platform from the virtualization market leader**

- Estimated **91% share** of the virtualization infrastructure software market<sup>1</sup>
- #1** in worldwide IT automation & configuration management software market share<sup>2</sup>
- VMware Cloud on AWS - **winner** of CRN's 2018 **Hybrid Cloud** Product of the Year
- Global leader** in WAN Edge Infrastructure (Inaugural edition) and **Hyperconverged Infrastructure**<sup>2</sup>

Unique relationship that brings world class solutions to our mutual clients

1: Source - Gartner Market Share Analysis: Virtualization Infrastructure Software (2018)  
2: Source - Gartner Magic Quadrant for WAN Edge Infrastructure (2018) | Gartner Magic Quadrant - Hyperconverged Infrastructure  
3: Source - IDC Worldwide IT Automation and Configuration Management Software Market Shares, 2017: Hybrid IT Drives Growth

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Figure 16 – Deloitte's partnerships with AWS and VMware

## GCP "Competencies & Partner Designations"

Deloitte's brings deep GCP experience and has been recognized by winning the 2018 Premier Partnership

### Premier Consulting Partner



We partner with our customers of all sizes to design, architect, build, migrate, and manage their workloads and applications on GCP.

### Migration Competency



We amplify cloud migration capabilities by leveraging industry insights, deep vendor relationships and proprietary tools that perform detailed analysis and prioritize migration roadmap.

### Machine Learning Competency



We speed up and scale out sophisticated machine learning models. We can help you use Google Cloud AI and machine learning services for your own data analysis, speech and image recognition applications, and more.



**Deloitte awarded the 2018 Global Services Partner of the Year**

### DevOps Competency



We are committed to evolving our technology skills and keep providing intelligent, automated managed services for our customers.

### Backup And Recovery



We can help you develop a well-designed, well-tested disaster recovery plan to ensure that the impact on your business's bottom line will be minimal when a catastrophe hits.

### Monitoring



We can provide visibility into the performance, uptime, and overall health of cloud-powered applications.

### Web Hosting



When you leave your web hosting IT management to us, you only pay for the resources you use (down to the second) and your team has more time to focus on growing your business.

### IoT Competency



We can help you gain real-time business insights from globally dispersed devices at the edge or in the cloud, with comprehensive services from Google Cloud IoT.

### Security Management



We can help you secure customer data and workflows through Google Cloud Platform.

### Network Competency



We can help you host and deliver your services around the world by using state-of-the-art software-defined networking and distributed systems technologies.

### API Management



We provide required tools and frameworks that make it easier for developers to not just develop their APIs but also to host and manage their APIs.

Figure 17 - Deloitte's partnerships with GCP

Recently a Fortune 500 Financial Services client was looking to implement a Hybrid Cloud architecture but were not able to achieve this goal with their current resources and talent. Deloitte's extensive experience in Hybrid Cloud architecture and implementation focusing on increasing resiliency, throughput, security while enhancing operations brought value to the client. We demonstrated this experience by engineering a Hybrid Cloud design, with an initial assessment and a future-state architecture build. We performed extensive Proof of Concept



testing to validate the future-state solution to the client's requirements. Our expert Cloud practitioners conducted the integration and deployment of the future state data enter facilities while managing multiple hardware, software and 3<sup>rd</sup> party organizations for this client. Deloitte's solution enabled our client to realize their goal of complete end-to-end application migration for over 2,000 applications and 13,000 systems which reduce costs, enhance service delivery while taking advantage of their current on-premises hardware cupelled with their virtualized application servers.

## *Systems Administration*

Deloitte has alliances with Dell, IBM, HP, AWS and Google, all of which can be leveraged in providing the right mix of systems solutions to deliver comprehensive Systems Administration Services Support.

Deloitte's team of System Administration practitioners was brought in by a **Fortune 500 company in insurance**. This client required database and System Administration Services Support which was due to their lack of technical resources, skills and systems solutions. Our team of Deloitte Systems Administration experts brought in a systems solution specifically designed for the Fortune 500 company's administration services in Linux, Windows, for both physical and virtual environments. Our comprehensive service solution included installation and configuration, security scanning and vulnerability remediation, maintenance, patch management, stabilization, monitoring, user management, and integration with the campus infrastructure. Our Systems Administration in database and support services enabled the client to increase their response times in the event of service outage with a more robust, secure and stable systems solution which translated into overall lower maintenance costs and high available systems platform.

## *Voice and Video Collaboration*

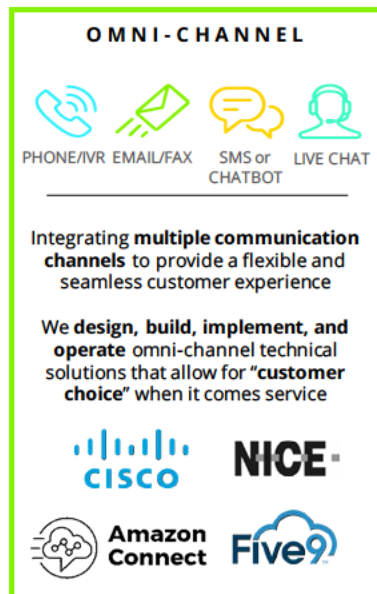
Deloitte possesses an ecosystem of long-term collaborations and alliances with many of the world's leading technology companies allowing us to understand, recommend, and support the most appropriate and innovative solutions for our clients. We partner with many industry-leading vendors in voice, video, and contact center solutions (e.g., Cisco, Avaya, Five9), reporting systems (e.g., Tableau), and customer relationship management (CRM) solutions (e.g., Salesforce, ServiceNow). We also have alliances with cloud (e.g., Amazon AWS) and robotics (e.g. UiPath), vendors and are leaders in developing solutions with these vendors. Among these alliances is our deep industry partnership with Cisco Systems across the breadth of their technology capabilities. Our alliance with Cisco, and other leading technology vendors, can help create business and technological value for our clients through leading technology solutions and Deloitte's technology domain expertise, business strategy, analytics and managed services. By leveraging these elements, we are able to help our clients convert leading edge ideas into tangible results, significantly improving the employee and end-user experience. With our experience in Higher Education supporting hundreds of institutions coupled with more than 2,400+ successful contact center implementations, we are confident in our ability to bring the right technology to deliver the business requirements and outcomes desired. Our customer-focused approach and industry leading customer experience offering can help improve the interactions and outcomes for unified communications.

Deloitte's technology professionals help clients identify and solve their most critical operations and technology challenges. Deloitte has been a trusted partner to leading institutions for decades and is recognized in the marketplace for our technology capabilities across the spectrum, from initial strategy to system integration, maintenance, and operations. Our technical capabilities bolstered by our deep functional expertise bring contextual frameworks on why and how technologies should be leveraged to enhance the mission of the University.

Deloitte has unparalleled enterprise contact center experience as expert engineers and technologists and as a trusted partner for contact center operations the firm has extensive experience helping clients across sectors transform how they interact with and serve their customers. As an industry leader in contact center solutions

**Figure 18 – Contact Center solutions** and customer experience services, Deloitte has been recognized for our





ability to deliver comprehensive and complex solutions for customers looking for innovative solutions to meet their evolving needs. Gartner, Forrester, IDC, and Kennedy/ALM have all recognized Deloitte as a leader in Digital Enterprise Strategy Consulting, CRM and Customer Experience Services, Digital Customer Strategy and both B2B and B2C Global Commerce Services. Deloitte's industry leading capabilities include designing, deploying, and operating high value, omni-channel contact center solutions for Fortune 100 private sector businesses, large scale government agencies, and institutions of higher education. Deloitte has implemented industry leading technology solutions from Five9, Cisco Unified Contact Center, Genesys, NICE, Avaya, and Amazon Connect. Deloitte collaborates and assists clients in developing contact center service delivery experience for their customers while avoiding expensive and unnecessary hardware and software purchases for services and solutions that will not enhance the customer experience.

Additionally, Deloitte has integrated and innovative Robotic Process Automation (RPA) solutions, including artificial intelligence (AI) and

machine learning (ML), to deploy next generation solutions including chatbots and sentiment analysis solutions that improve quality of service, accelerate problem resolution, and provide meaningful insight into customer interaction. These RPA solutions are aligned with a dedicated practice of 100+ professionals with experience in customer experience (CX), channel strategy, cloud and expertise across customer relationship management (CRM) platforms so that the solutions we design, test, deploy and deliver are built within the contextual framework of delivering a world class customer experience.

Universities may look to modernize their unified communications and contact center capabilities to meet increasing student/employee demands or to mitigate the risks associated with legacy technology, increasing budget constraints, evolving student profiles, or other operational issues. Effective contact centers support the streamlining of operations and provide an improved customer experience in order to address the efficiency and effectiveness of service delivery while managing student/employee requests.

## Project, Program, and Portfolio Management Services (RFP Section XI.1.a.iv)

We deliver **Project, Program, and Portfolio Management Services** by drawing on capabilities and offerings from several areas of our practice. Our experience includes providing these services within the course of the many different projects Deloitte has delivered for R1 institutions, both public and private.

Project, Program, and Portfolio Management Services	Experience?	Description
Resource Capacity Planning	✓	<ul style="list-style-type: none"> <li>Deploy people with right and relevant skills which helps drive support continuity for the engagement</li> </ul>
Resource Sourcing and Management	✓	<ul style="list-style-type: none"> <li>Acquire, develop, and manage team members for the duration of the engagement</li> </ul>
Time Management	✓	<ul style="list-style-type: none"> <li>Allocate, track, and report of resource time to milestones, deliverables, and tasks to confirm that the right work is managed at the right level</li> </ul>
Demand Management	✓	<ul style="list-style-type: none"> <li>Manage and prioritize requests to support tasks and services that bring the greatest value to the engagement</li> </ul>



Project, Program, and Portfolio Management Services	Experience?	Description
Reporting Services	✓	<ul style="list-style-type: none"> <li>Utilize project management tools, dashboards, accelerators and artifacts that can be tailored to establish and run an effective governance structure</li> </ul>
Integration	✓	<ul style="list-style-type: none"> <li>Provide kick-off and alignment workshops, facilitate functional and cross-functional integration planning efforts, and enable communication</li> </ul>

Table 8 – Project, Program, Portfolio Management Services

A recent example of a successful project was a total network transformation that Deloitte completed for a **private R1 institution**. The University's network has historically been structured as several flat networks that suffered from multiple performance and management issues, as well as technology gaps related to efficiency, effectiveness, and information security. Deloitte designed and implemented a new layer 3 leaf & spine network architecture that included 293 building upgrades (including the School of Medicine), 12 secure network segments, 40 co-location customer migrations, and 140 plus application migrations. The size, scope, and impact of this project required strong project, program, and portfolio management to manage the multiple workstreams and dependencies. Using our proprietary Project and Program Management methodology described below, our team was able to successfully complete the entire network transformation project over the course of 18 months, and within the established budget. Additional examples of successful projects using this methodology are available in the [Recent Projects \(RFP Section XI.1.g\)](#) section of this document.

#### *Project and Program Management*

Deloitte brings extensive project management experience and a disciplined approach that incorporates our experiences gained from similar engagements. We do this using our proprietary Enterprise Value Delivery (EVD) method. EVD for Project and Program Management is a project and quality management focused method and is completely embedded in all EVD methods. The method includes processes, templates, and other collateral as part of our structured project management approach to deliver high quality and standardized project management services.

EVD for Project and Program Management is based on the Project Management Body of Knowledge (PMBOK) and supports all activities that are executed during the engagement life cycle. It has an extendable framework that can be customized for specific organizations and projects, in various industries such as higher-ed, and it incorporates a scalable architecture that provides a starting point to adapt and deploy a highly flexible and reliable system with ease of maintenance. Our method is configurable in that it is designed to serve environments of varying scales and can be tailored to support Mason's needs.

EVD for Project and Program Management provides a solution that helps our teams spend less time on how to plan and execute and more time on delivering high-quality results on time and on budget, while reducing risk on the project or program. The table below summarizes the PMBOK alignment and potential benefits of our EVD for Project and Program Management methodology.

PMBOK Knowledge Area	Value Drivers
Integration Management	<ul style="list-style-type: none"> <li>Provides repeatable tasks, standard templates &amp; samples, and supporting tools that document the project or program's existence and authority to apply organization resources to activities.</li> </ul>
Scope Management	<ul style="list-style-type: none"> <li>Builds team awareness to address factors that may result in scope changes and establishes control processes to manage identified changes to scope.</li> </ul>



PMBOK Knowledge Area	Value Drivers
<b>Time Management</b>	<ul style="list-style-type: none"> <li>Includes processes needed to manage the timely completion of the project or program.</li> </ul>
<b>Cost Management</b>	<ul style="list-style-type: none"> <li>Provides planning, estimating and budgeting activities to complete project or program within the approved budget.</li> </ul>
<b>Quality Management</b>	<ul style="list-style-type: none"> <li>Includes processes and activities that determine quality objectives and responsibilities to deliver quality.</li> </ul>
<b>Human Resource Management</b>	<ul style="list-style-type: none"> <li>Includes processes needed to organize, manage, and lead the team.</li> </ul>
<b>Communication Management</b>	<ul style="list-style-type: none"> <li>Promotes timely planning, collection, creation, distribution, storage and management of information.</li> </ul>
<b>Risk Management</b>	<ul style="list-style-type: none"> <li>Provides processes and standard templates &amp; samples, and supporting tools for conducting risk management planning, identification, analysis, response planning, and controlling risks.</li> </ul>
<b>Stakeholder Management</b>	<ul style="list-style-type: none"> <li>Develops appropriate management strategies for effectively engaging stakeholders in decisions and execution.</li> </ul>

Table 9 – PMBOK Knowledge Areas and Respective Value Drivers

We are proposing a structured approach to the delivery of the solution that requires strong governance and close partnership between Mason and the Deloitte project team, as well as, clear lines of delineation and communication with any potential 3<sup>rd</sup> party vendors.

Our integrated project and program management (PM) approach provides the framework for how projects and programs will be initiated, planned, executed, controlled and closed throughout the engagement life cycle, whether using a Waterfall, Agile, or hybrid delivery approach. By integrating our processes and tools as the project or program progresses, the PM approach can meet the specific needs while balancing control and flexibility. The tasks fall under three activities: Plan, Manage, and Close.

- Plan tasks include developing the overall approach, resources, tools, budget, controls, and schedule to support execution. The approach is documented in various plans (such as the project charter, project management plan, program management plan, and work plan) that the team will use as a guide to achieve all objectives. This approach provides a transparent platform for planning and managing the project or program throughout its entire life cycle.
- Manage tasks include implementing and maintaining the processes used to monitor and control scope, schedule, and budget. Status reporting and metrics are used to identify potential issues and perform preventive and corrective actions, which are facilitated by our pre-configured Tableau accelerators that allow rapid and flexible data reporting.

In addition, scope is managed by acceptance criteria that are set to confirm that expectations are aligned before work activities supporting deliverables commence. Then, the scope of the work can be well defined prior to work being started by the team, which helps the team manage scope during the project or program.

- Close tasks include validation that all activities in the work plan are completed; all risks, issues, and action items are closed; artifacts are archived; final metrics are collected and analyzed; and a formal lessons-learned session is completed.



Once scope is reviewed and signed off by Mason, any further changes, updates, or enhancements will be incorporated after approval of change requests. Change requests confirm the value of the change and the ability to deliver. The final scope management activity is to confirm that the deliverables that need to be turned over to the client as part of the solution are signed off, and where necessary, formally accepted by Mason.

#### *Resource Capacity Planning*

Processes are in place to appropriately manage resources and their capacity. This occurs at the team and individual resource level. Integral to work plan management, work activities are used to plan the team's capacity, determine the team's current workload, and then evaluate if the team has enough capacity to complete the work. These tasks provide the team with data to determine if the workload they are agreeing to is reasonable and helps them avoid overcommitting themselves and endangering the quality of the solution.

#### *Resource Sourcing and Management*

Our resource management approach includes processes for acquiring, developing, and managing team members for the duration of the project/program. To support this, we use our NextGen project scoping and estimation solution. NextGen is a web-based solution, integrated across Deloitte's service offerings and features the ability to quickly provide ballpark estimates, develop detailed estimates, and display the results in a user-friendly dashboard.

The team will include both Mason personnel and Deloitte resources. All these scenarios will be planned for and managed throughout the life cycle. Team members will be provided orientation and onboarding for quick ramp-up. Many may need additional training to prepare them to perform their roles effectively. This training will be identified and planned during initiation and managed throughout execution.

One of Deloitte's strengths in the marketplace is our deep pool of skilled resources. Our experience with large-scale projects require us to be agile in scaling up and down, the required resources needed to meet project demands. We do this through our initial planning, and throughout each phase of the project. In each case, our goal is to make the most efficient use of our resources, such as re-allocating resources to other workstreams, introducing new resources, or rolling off resources where appropriate.

#### *Time Management*

Our Work Plan Management framework serves as the basis for how we effectively allocate, track, and report resource time to milestones, deliverables, and tasks for transition to confirm that the right work is managed at the right level.

The overall project is planned and managed using an integrated work plan. We use a "rolling wave" planning approach to develop a deliverable-based integrated work plan by phase. This work plan focuses on value and confirms that the work effort is appropriately planned, and the critical path is defined before the plan is baselined. The detailed work plan is then developed at the team level or for specific high-frequency tasks for management and control at the team or work-product level.

Once work plans are established, they will be executed and managed, which includes publishing the assignments to the team, tracking their progress, calculating and analyzing overall performance, and re-planning when necessary. So that work plan performance stays on track and metrics are trending appropriately, Deloitte and Mason will work closely together to determine if any corrective actions are needed throughout the project, which may require coordination with leadership or executive sponsors for input, review, and approval.

To support these project and program management efforts, we use (in addition to Microsoft Project) Project Management Center (PMC) and Smartsheets, both of which are Web-based project and program management tools for schedule management and status reporting. PMC and Smartsheets provides a central platform for managing the implementation plan and status updates by team members for their assigned tasks. Reporting



activity progress can highlight critical path activities, late/slipping tasks, and deliverable completion rates along with the planned versus actual efforts taken for the task. Dashboards provide stakeholders with quick and easily digestible status reporting. PMC and Smartsheets facilitates mutual collaboration and understanding of progress tracking relative to the implementation plan.

## *Demand Management*

Deloitte will work with Mason program leadership to manage and prioritize demands to support projects that bring the greatest value to the University. Our program governance structure includes a defined and structured Demand Management process. At a high level, our process includes:

- Establishing a formal intake process
- Determine project value as it relates to the organizational goals and initiatives
- Identify estimated project costs and available budget
- Recommend project prioritization to campus leadership/governance committee

Once the project has been prioritized, we then begin the process of planning, which includes developing the overall approach, resources, tools, budget, controls, and schedule to support execution.

## *Reporting Services*

Our Project and Program Management methodology provides sample project management tools, dashboards, accelerators and reports that can easily be tailored to establish and run an effective governance structure. Our goal is to capture as many automated metrics as possible for more effective Program and Project management and success. Typical reports include:

- Project Status Executive Summary - provides a high-level snapshot of the current state of the program. It provides an executive level summary of the health of the overall program and the individual projects within it
- Contract Deliverables and Milestone Status Summary – provides a summary view of the current state of project deliverables, identifying whether the deliverable is on track for on-time delivery
- Project Burndown – focuses on the number of hours the project is using, or burning, compared to what was planned (Planned vs. Actual)
- Sprint Velocity – tracks the actual amount of work completed from Sprint to Sprint (Agile)
- Budget Health – shows the details of the current state of the budget (Planned vs. Actual)

These are just some of the typical reporting we conduct throughout the project. Each project will have specific requirements and needs. We will work with Mason to identify and develop customized reports that bring value to organization.

## *Issue Management*

It is important to promptly identify and address issues that can impede productivity, increase rework, and decrease the quality and timeliness of the solution. We have an established process to help identify issues and resolve them before they significantly affect the project and program. Our issue resolution process is collaborative and draws on our extensive experience delivering numerous large-scale transformation projects.

An essential component of the issue management process is also effective communication between Mason stakeholders and the Deloitte team. Mutually agreed-upon parameters will be defined to report issues on a consistent basis. We will use the PMC tool to record, track, manage, and communicate issues throughout the life of the project or program.

## *Quality Management*

Our Quality Management (QM) approach promotes the execution and delivery of high-quality solutions by providing checks and balances against our PM and delivery standards, where both PM and QM activities are integrated throughout the discipline.



Quality confirmation processes help establish quality criteria for verifying and validating deliverables and evaluating processes and assets against Deloitte's PM and delivery standards:

- **Quality Planning:** Identifies the relevant quality standards, processes, and tools based on quality objectives and the approach to satisfy the quality standards
- **Quality Assurance:** Evaluates the overall project and program to confirm that processes and tools are being used as per their true intent, resulting in delivery of a high-quality solution. These activities also help CSU to gain confidence that the project and program will satisfy the relevant quality standards
- **Monitor and Control Quality:** Monitors specific results to determine compliance with relevant quality standards and identifies ways to eliminate unsatisfactory performance
- **Quality Support:** Involves specialists outside the team who provide additional oversight and support to the project and program to execute the activities as defined in the project or program management plan

Our Agile Framework supports projects and programs building in quality from the start, first by establishing clear definitions of **ready** and **done** and including acceptance criteria in every user story. During the testing phase, quality is reinforced when testing is shifted to occur after the sprints are completed so that all enhancements are included before testing. Finally, by obtaining continuous feedback via collaboration throughout the sprint and sprint reviews (demos of the solution at the end of every sprint) and through consistently performing sprint retrospectives, the quality of the product is constantly being reviewed, allowing the project or program to take preventive/corrective actions or improvements in the very next sprint. The figure below defines the overall objectives of Deloitte's QM approach.



**Figure 19 – Quality Management**

In addition to our standard QM approach and for large scale projects/programs, Deloitte will assign a QA (Quality Assurance) Principal within our firm who will periodically meet with key client stakeholders to review the status of the project and deliverables and address any potential quality issues and concerns. This is a service that Deloitte provides to our clients at no additional cost, to drive quality and meet contractual expectations.



## Security Services (RFP Section XI.1.a.v)

We deliver **Security Services** by drawing on capabilities and offerings from several areas of our practice. The table below outlines some types of services that Deloitte can provide for George Mason University as requested in the RFP.

Security Services	Experience?	Description
Threat Management	✓	<ul style="list-style-type: none"> <li>Help the organization detect advanced threats, protect critical assets, and respond to and recover from disruptions</li> </ul>
Perimeter Security	✓	<ul style="list-style-type: none"> <li>Help the organization secure network data and resources with the use of functional devices, such as firewalls</li> </ul>
Internal Network Security	✓	<ul style="list-style-type: none"> <li>Help the organization deploy hardware and software technologies to protect and manage access, usability, and integrity of its network and data</li> </ul>
Endpoint Security	✓	<ul style="list-style-type: none"> <li>Help the organization extend protection to all endpoints</li> </ul>
Application Security	✓	<ul style="list-style-type: none"> <li>Help the organization establish and drive security-focused software development such as cloud migration, microservices and containerization</li> </ul>
Data Security	✓	<ul style="list-style-type: none"> <li>Help the organization protect critical business data from undesired access and secure data, including authorization, authentication, and encryption</li> </ul>

Table 10 – Security Services

Deloitte has been providing security-related experience since 1999. We are the only organization with the breadth, depth, and insight to help complex organizations become Secure, Vigilant, and Resilient. Our cyber security practice is recognized by Gartner as the #1 cyber security provider with the most extensive network of technology partners. Below is the reference:

**Title: Gartner:** Security Consulting Services Worldwide, Market Share Analysis, 2018

**Quotes:** Gartner ranks Deloitte #1 for Consulting Services Worldwide, based on market share, in 2018

**Source:** Gartner, Market Share Analysis: Consulting Services Worldwide, 2018, Dean Blackmore, Cathy Tornbohm, David Ackerman, Patrick Sullivan, Colleen Graham, Misako Sawai, Chrissy Healey, Neil Barton, 3 May 2019

**Domain Areas:** Cyber, Risk, Security Privacy and Resiliency

**Analyst Firm:** Gartner

**Relevant Region:** Global

**Created:** 2019-08-14T08:40:30Z

We strengthened cyber threat detection offerings via acquisition of Vigilant, Inc. We have extensive experience working with all facets of data breaches and cyber incidents including the navigation of multi-faceted decision points that will arise when dealing with law enforcement, technology issues and beyond to the broader business. We have been recognized in the industry for our cyber security services. According to the Kennedy



Consulting Research & Advisory, “Deloitte brings a strong value proposition to cyber security consulting by melding its industry expertise, its “one approach, one model,” cyber security-specific investments, and C-suite communication capabilities (Published in 2014).

Our Cyber Risk Security Practice has enabled us to become a global leader in delivering security solutions to organizations. We can provide you with a variety of services, ranging from cybersecurity consulting to managed services and information services that help you detect and respond to emerging cyber threats.

Deloitte is recognized by national and global clients, industry analysts, service providers, and other stakeholders as a global leader in professional services across a diverse set of capabilities. Deloitte’s Identity Access Management (IAM) services are part of their Cyber Risk Services practice and have received many accolades from research analysts and industry organizations. Some of such recognitions are mentioned in the table below.

Accolades	
<ul style="list-style-type: none"> <li>Named a global leader in Cybersecurity Consulting based on strategy and current offering by Forrester; Source: Forrester Research, Forrester Wave™: Global Cybersecurity Consulting Providers, Q2 2019”, Jeff Pollard and Claire O’Malley, May 1, 2019</li> <li>Ranked #1 globally in Security Consulting, 7th consecutive year, based on revenue by Gartner; Source: Gartner, Market Share Analysis: Security Consulting, Worldwide, 2018, Elizabeth Kim, May 2019</li> <li>Named a global leader in Cybersecurity based on capabilities by ALM Intelligence; Source: ALM Intelligence; Cybersecurity Consulting 2018; ALM Intelligence estimates © 2018 ALM Media Properties, LLC. Reproduced under license</li> </ul>	<ul style="list-style-type: none"> <li>We are at the forefront of identity innovations and continue to demonstrate our passion for cybersecurity through our dedicated Cyber Risk Services practice, industry leadership and contributions. As an example, we have collaborated with the National Association of State Chief Information Officers (NASCIO) in 2010, 2012, 2014, 2016, 2018 and again in 2020</li> <li>The 2020 cybersecurity study survey can be found at: “The Agile State CIO: Leading in a time of uncertainty” (<a href="https://www.nascio.org/wp-content/uploads/2020/10/2020-State-CIO-Survey.pdf">https://www.nascio.org/wp-content/uploads/2020/10/2020-State-CIO-Survey.pdf</a>) provides actionable cybersecurity insights for our state clients</li> </ul>

Table 11 – Deloitte’s IAM Services Accolades

We bring a broad range of experience and leading practices in Higher Education, as well as state and local governments, to help our clients successfully transform and improve their organizations. Our clients rely on Deloitte to partner with them on their most strategic initiatives. We work in collaboration with key stakeholders, keeping in mind the priorities and mission of the organization. We also appreciate that each of our clients is unique. By putting ourselves in our client’s shoes, we walk in their footsteps to see what they see. The result is a true consulting partner who is committed to our client’s success.

#### Operational Plan

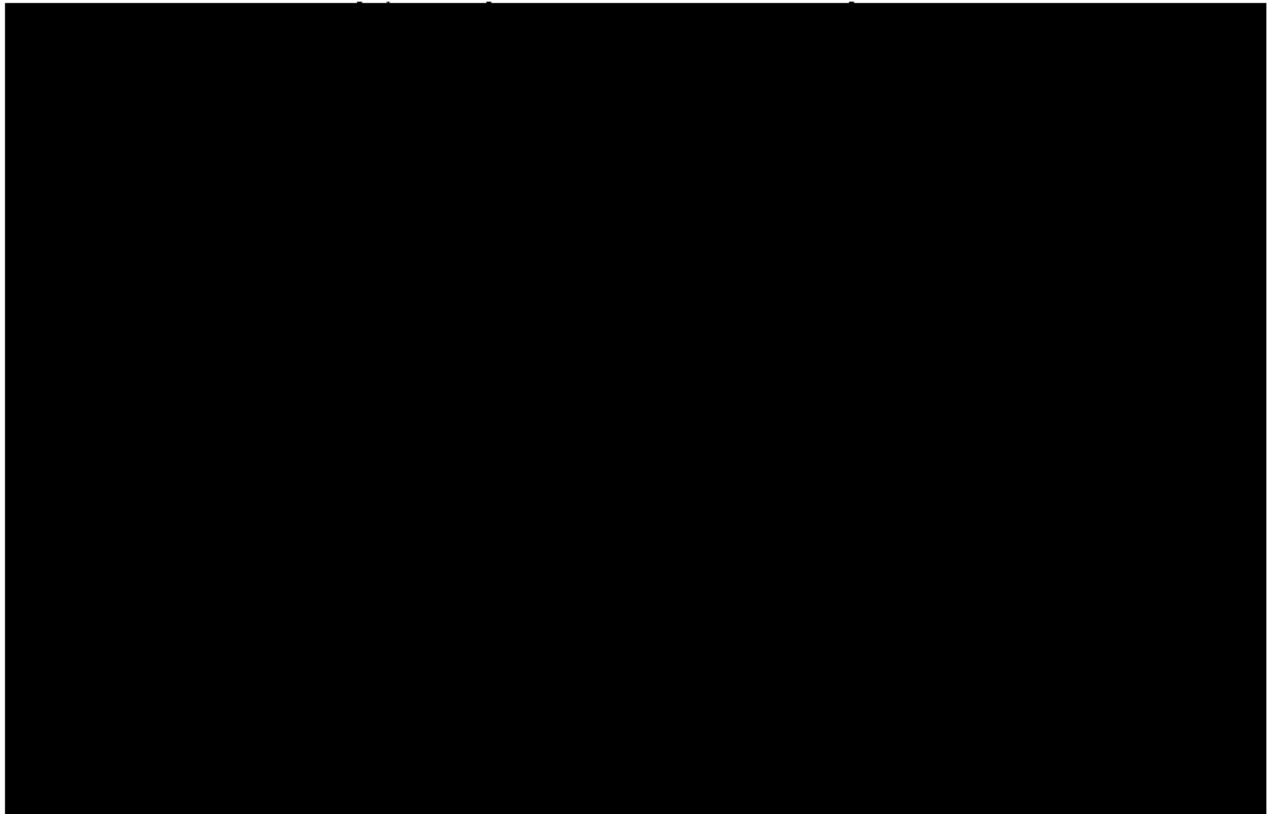
By virtue of our experience providing these services to other large organizations in various industries, we have the ability to provide customized IT security solutions. Deloitte’s extensive cyber risk resources will be valuable in driving the enhancement of information security for Mason’s business and technology environments.

Our approach will assist you in the holistic improvement of your IT security program and encompasses quick wins. Our strategic road map will be focused on enhanced architecture, more robust controls, and formalized standards and procedures. Through our solution, we will be instrumental in helping you navigate your immediate security needs and achieve your long-term vision and strategies.

Deloitte’s Cyber Strategy Framework (CSF) uses a proven methodology to determine the most important cyber capabilities for an organization to invest in given their specific business and threat profile. Our approach is based around these three components: business, threats and capabilities.



Our methodology consists of a six-stage process encompassing Client's business, threats and capabilities. At each stage we will work closely with client to understand the crown jewels that support your business model and strategy (business) and the threat actors and threat techniques that are most relevant to your organization (threats). The figure below depicts Deloitte's operational approach regarding IT security solutions.



*Deep understanding of the requirements and challenges of Higher Education Institutions*

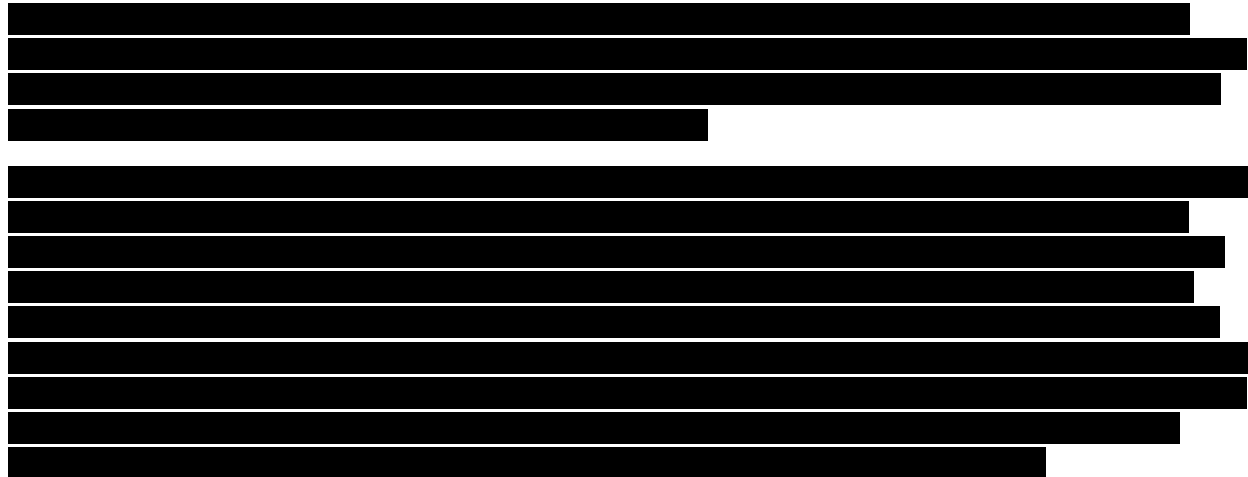
Deloitte has developed a keen understanding of the Higher Education landscape. In recent years, we have been on the forefront of assisting several Higher Education Institutions and other organizations achieve similar goals through our transformational engagements.

*Extensive experience in delivering large and complex IAM programs*

A specific measure of effectiveness when delivering a complex transformational IAM program, such as yours, is to endeavor to provide continuous availability of critical IAM services with minimal disruptions for end users during the period of transition. Deloitte will bring to bear our 20+ years of experience acquired while executing thousands of IAM implementations for Fortune 500 companies and other large institutions. Our experience allows us to efficiently synthesize complex use cases and requirements into practical user-centric alternatives. We have been recognized by leading IT research firms as leaders in the IAM space; a result of our thought leadership, vast client service experience, and strategic vendor relationships.







## *Leadership in delivering cloud based IAM solutions – Digital Identity*

Deloitte has leveraged its strategic alliance with cloud computing and IAM product vendors to design a Deloitte Digital Identity (DI or Digital Identity) for Higher Education platform, which is a secured cloud based IAM platform that provides foundational IAM capabilities (Identity Governance & Administration (IGA), Access Management including federation and multi-factor authentication (AM), Directory Services (DS), and Consumer Identity (CIAM)). Deloitte's Digital Identity can offer the University with a modern, secure and industry leading platform that supports rapid on-boarding of common capabilities desired by higher-education institutions.

A **private institution in California** wanted to implement, manage, and operate a Digital Identity platform for Identity Governance and Administration services, as well as the implementation of Access Management tool. Key applications were onboarded, including the authoritative sources, directories (AD and LDAP), Kerberos, Office 365, Google Apps and other enterprise applications. User lifecycle events (joiner/mover/leaver/academic term processing) were automated. Non-human account lifecycle management allowed for the implementations and integrations of tools, applications, and capabilities, such as Shibboleth for single sign-on, SIEM capabilities, and Privileged Access Management tool for privileged access governance. The access management tool integrated with DuoSecurity for multi-factor authentication and Enzoic for compromised password detection. Password vaulting and Credential cycling were set up for accessing key applications, including Windows, Unix, and high-value assets, in addition to session recording for Payment Card Industry (PCI) systems. Deloitte hosted and managed the platform and tool at the desire and request of the institution.

## *Deloitte is a leader in delivering Fusion Management Services*

Our solution provides increased stability and predictability of operations

- Increase operational efficiency of SOC services
- Reduce outages through more preemptive maintenance and monitoring
- Apply industry knowledge and lessons learned and data-driven, feedback on operations to development/business team for process simplification
- Alleviate reliance on hard to find and retain, specialized skill sets

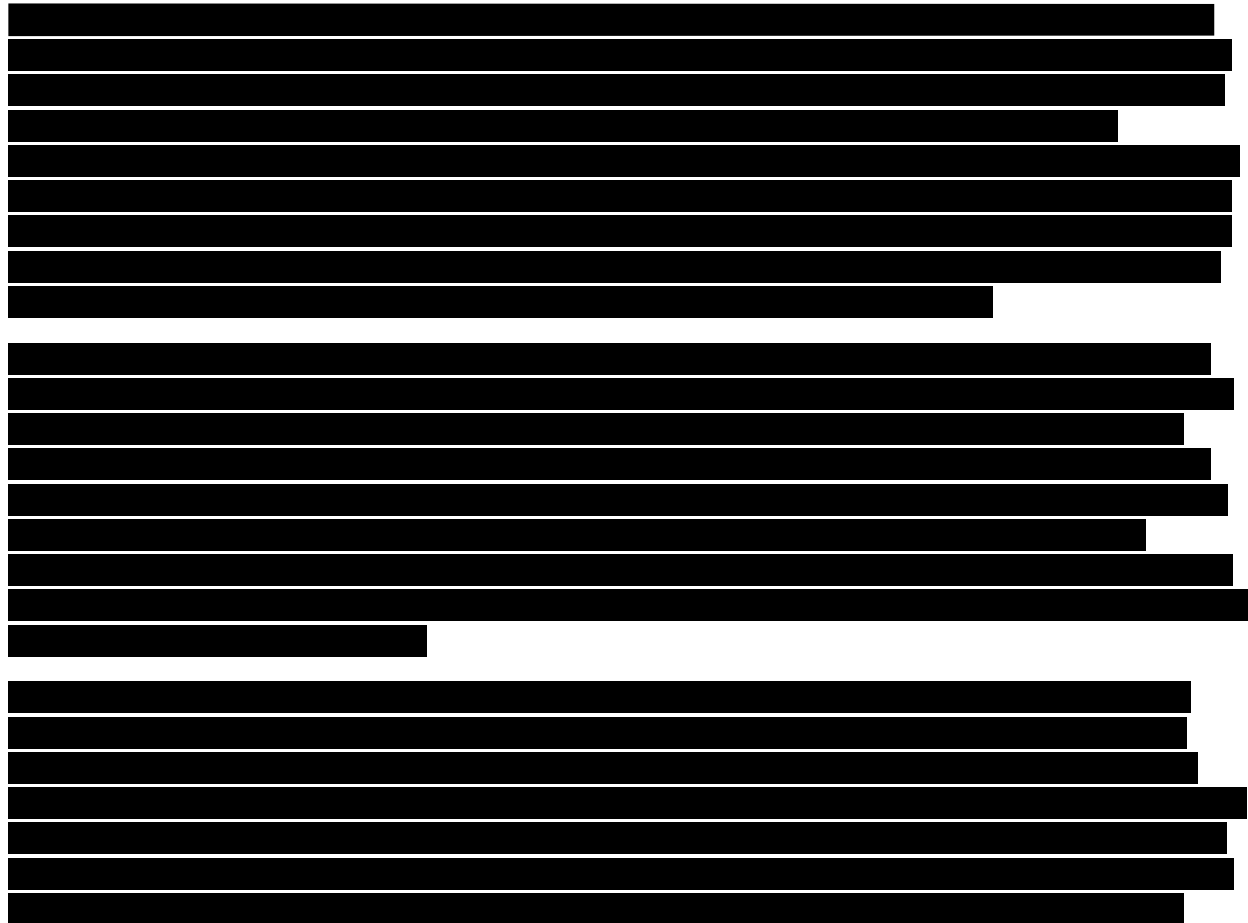
Sustainable and scalable operating model

- Offer a variety of cost effective, global-managed services delivery models (e.g., 12x5, 24x7, 24x5, etc.)
- Flex on demand and scale quickly and cost effectively with a leveraged offshore model to address spikes, growth, and new capabilities



## Threat Management

Deloitte's Ensemble Threat Detection™ solution, which offers a vendor agnostic machine learning based approach that utilizes various algorithms and customized rules for optimized detection and response. The solution implements a fusion of Behavioral Analytics and rule-based detection to get the most out of your data and security stack. It is an approach that uses a combination of Ensemble Modeling and Rule Optimization to identify threats faster; and recognize previously unknown threats in an environment. This high-confidence threat detection capability uses a faster and more effective mechanism than traditional approaches. The results reduced false positives, reduced dwell time, and improved end-to-end performance. The figure below depicts an overview of Deloitte's Ensemble Threat Detection™ solution along with example business scenarios.





## IT Service Delivery Approach and Methodology (RFP Section XI.1.b)

### RFP Reference: XI.1.b Statement of Needs

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.

Deloitte's Higher Education clients have benefited from the breadth and depth of our competencies and capabilities across all functions of their organization. As a thought leader in the industry, Deloitte has developed a vast collection of assets, frameworks, methodologies, and knowledge that has allowed us to remain a leader in the market. At the heart of Deloitte's services is our unique model to delivering our capabilities through our Advise – Implement – Operate (A-I-O) Engagement Model. Integrating our capabilities across Advise, Implement, Operate optimizes our services and deepens, as well as sustains, our trusted relationships. We provide end-to-end solutions on our clients' toughest issues – Advising on these important issues, implementing solutions for their biggest programs, and Operating critical services to sustain improvements in these issue areas. Delivering end to end A-I-O services allow us to drive greater insights for our clients that can't be obtained from past services delivered in a transactional method.

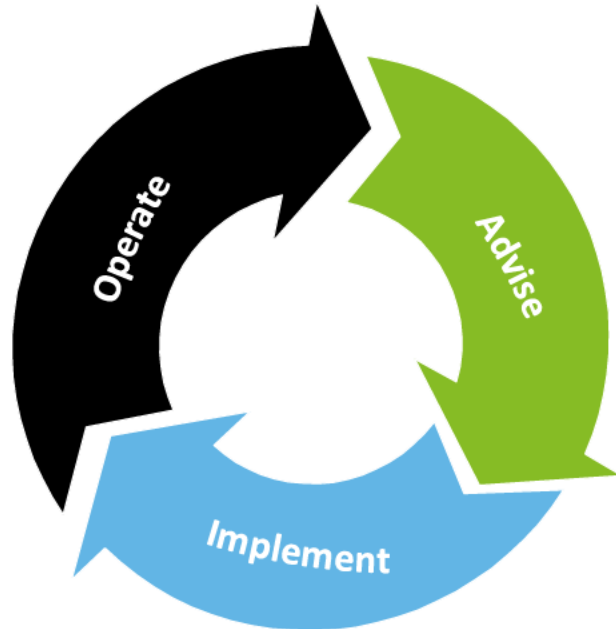


Figure 21 – Deloitte's Advise – Implement – Operate Engagement Model

Our Advise model helps clients as they navigate increased complexity, enabling them to make superior decisions. Next, our implement model allows flawless execution to help clients build new capabilities through critical infrastructural and systems investments. Finally, our operate model demonstrates our ability to operate and manage increasingly high-value-add elements of our clients' business, enabling us to deliver measurable results in new, unique, ways. Leveraging this unique A-I-O model we can better position ourselves as a long-term partner for our clients to deliver higher value with reduced costs, improve risk management awareness and predictability, and develop greater insights to drive efficiencies. Our Advise-Implement-Operate model provides a balanced and integrated end to end approach to help drive the evolution of our clients ever changing IT and business environment challenges.

No other firm can match Deloitte's breadth of capabilities, and by leveraging the full power of Deloitte's multi-disciplinary services (tax, risk, cyber, financial advisory and consulting) we are able to offer innovative technologies, such as AI, RPA, IoT and Blockchain and extend our ecosystem, market data and consortiums, and to help our clients gain market differentiation with new business models. Deloitte is able to scale to deliver across any industry around the world. We have practitioners across our delivery centers worldwide that are dedicated to providing our Services to clients around the world. Deloitte's strategy is to determine where our clients are today, what burning issues affect their business, and help lead them through a transformational process that puts them on the path to realizing their long-term strategy. Deloitte is laser-focused on resolving client issues and achieving business outcomes.

Deloitte makes continual investments in the latest developments to enable proactive intelligent application maintenance, and we bring a technology-centric approach coupled with deep advisory skills to apply our



analytics, AI, and RPA to drive business outcomes. Deloitte provides the full lifecycle of services including Advise, Implement, and Operate to deliver, maintain and enhance technologies across multiple industries. We offer a full suite of capabilities, internally and with ecosystem partners, to deliver client outcomes.

Deloitte's dedication to advancing the technology disciplines, investing in our client partners, and remaining grounded in our desire to be innovative, is demonstrated in our collaboration between Deloitte and Wichita State University—**The Smart Factory @ Wichita State University**. The Smart Factory @ Wichita features a suite of technology that includes additive manufacturing, collaborative robotics, advanced materials and composites, automation, reverse engineering, AR/VR prototyping simulators, and 3D printing. Access to these capabilities, and much more helps us get smart on the art of the possible when it comes to Industry 4.0, while advancing the mission of Wichita State to be one of the nation's most innovative public research universities. The Smart Factory @ Wichita, located at Wichita State University, is one of several of Deloitte's global immersive experiences designed to accelerate digital transformation.

As highlighted above, Deloitte possesses the breadth and depth of corporate competencies and capabilities that Mason requires to remain a leading, public research institution. Each capability and competency leverages their individualized approaches and methodologies that the unique challenges facing institutions requires. Our approaches and methodologies leverage industry best practices, demonstrates Deloitte thought leadership, and allows us to have immediate and lasting impact across our portfolio of clients. By leveraging the best in class talent, knowledge, platforms, and intellectual property and tools, we drive operational innovation from the ground up. Deploying integrated delivery models that leverage the full breadth and depth of our domain, industry, functions and technology capabilities allows us to deliver holistic services to our clients. A focus on taking the issue to impact means innovation is part of the journey, not the destination. This allows us to be innovative throughout our client's relationships, from flexible deal constructs to creative operate service delivery approaches and, of course, innovative solutions. We leverage our experiences and best practices to configure a delivery structure and corresponding business model that brings the right resources with the right capabilities at the most effective price to meet our client's objectives.

## Higher Education Market Offering

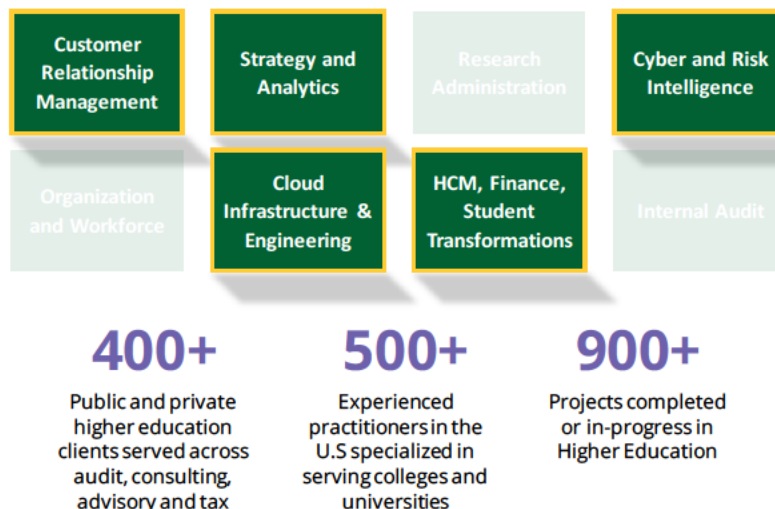


Figure 22 – Snapshot of Deloitte's Higher Education Practice

including operational and financial transformation, student experience redesign, enterprise technology solutions, organizational leadership, and change management.

Deloitte is dedicated to advancing the mission of Higher Education by working hands-on with institutions nationwide to achieve lasting, impactful and measurable results. We are a recognized leader in the Higher Education space and have solved complex problems on over 900 projects with public and private Higher Education institutions nationwide. Deloitte's Higher Education team has experienced professionals and industry leaders that turn ideas into impact for Higher Education institutions. Our professionals have solved some of the toughest Higher Education challenges for our clients,



The breadth and depth of Deloitte's experiences and diverse capabilities within Higher Education and other industries enable us to call upon multiple technology-specific resources as needed. We have approximately 7,000 technology employees in the US, with a significant number focused on Higher Education projects. Given the role of IT as a strategic enabler for teaching and learning, research, and administration, across an institution, we have often found that Higher Education IT initiatives are bolstered when other technology capabilities are brought to bear.

Deloitte's technology professionals help clients identify and solve their most critical operations and technology challenges. We are recognized in the marketplace for capabilities across the spectrum, from initial strategy to system integration, maintenance, and operations. Our experienced technology professionals offer deep technical experience and are aligned with a technology service offering to promote the continued development of their technical skills and experiences.

[Redacted text block]

[Redacted text block]

[Redacted text block]

As outlined above when demonstrating our corporate experience and competencies in Project, Program, and Portfolio management, Deloitte has a disciplined approach that follows our proprietary Enterprise Value



Delivery (EVD) method for Project and Program Management. This method is a focused approach that enables the successful planning and execution of our projects and includes scope management principles. It helps our teams spend less time on how to plan and execute and more time on delivering high-quality results on time and on budget, while reducing risk on the project or program.

As outlined in detail above, the EVD method is built on the foundation of the industry leading practices of PMBOK. Within our EVD method, scope is managed by acceptance criteria that are set to confirm that expectations are aligned before work activities supporting deliverables commence. By ensuring a well-defined

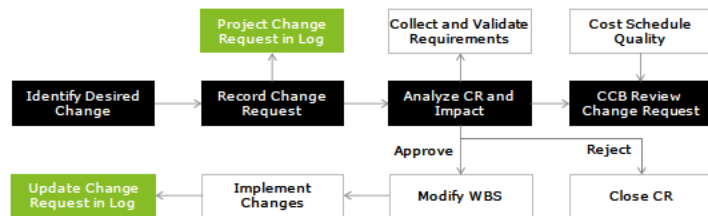


Figure 23 - Change Request Process Flow

scope exists prior to the commencement of work helps our team manage scope effectively throughout the duration of our efforts. Upon acceptance of scope, in close collaboration with Mason, any further changes, updates, or enhancements will be incorporated after approval of change requests. Change requests ensure the value of the change, and our

teams' ability to deliver, is adequately considered before acceptance. Scope will include clearly defined deliverables that are presented and mutually agreed upon in close collaboration with our University partner. The same best in class capabilities we demonstrate and provide to our clients we leverage internally for our own project delivery for managing scope as well as the full project lifecycle.








## Qualifications & Experience (RFP Section XI.1.c)


### RFP Reference: XI.1.c Statement of Needs

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.



The experience of our team is a critical success factor for Mason and a differentiator for Deloitte. We take great pride in its ability to deliver quality services and knowledgeable staff for our clients. Our Higher Education experts have solved some of the toughest domain challenges for our clients, driving operational and financial transformation, advanced analytics application to discover enrollment and financial aid insights, enterprise technology solutions implementation, student experience redesign, and organizational change management.




We view this engagement as a partnership with Mason and are committed to working together every step of the way. Our curated and collaborative Deloitte team brings extensive experience and passion for Higher Education to assist Mason in providing a high-level strategic and tactical expertise across a range of services that will support the technologies used by the University

<b>Roy Mathew:</b>	<b>Principal; National Higher Education Practice Leader</b>		
	<p>Roy is a principal and serves as the practice lead of Deloitte's Higher Education group, bringing over 20 years of IT assessment and transformation experience. He has extensive experience working with Higher Education institutions to address both strategic and operational IT and other administrative [REDACTED]</p> <p>[REDACTED]</p> <p>He has deep experience and knowledge in setting up and running large IT transformation programs that have involved the establishment of effective IT governance structures; development of IT financial management, pricing, and chargeback models; management of IT organizational and workforce development changes; IT application and infrastructure transformations; and establishment of change management programs.</p>		
			
<b>Education</b>	<p>Roy received his Master of Science in Engineering from Stanford University and his Bachelor of Science in Engineering from the Georgia Institute of Technology.</p>		

<b>Cole Clark</b>	<b>Regional Practice Leader</b>		
	<p>Cole is a National Director, Higher Education Client Relations in Deloitte Consulting's Higher Education practice. As a senior global Higher Education industry executive with over 25 years of experience in Higher Education strategy, technology, partner ecosystem development, and education policy, he has worked with hundreds of colleges, universities and multi-national nonprofit research organizations in various leadership positions.</p> <p>Cole has been a regular contributor to the opinion-editorial pages of leading industry publications, and he has chaired Oracle's presence at many industry conferences and events such as EDUCAUSE, Alliance, NACUBO and EUNIS. He led the Higher Education Industry Strategy Council for Education and Research and has moderated numerous panels that have included University presidents, CFOs and CIOs discussing technology's role in enabling transformation and institutional excellence in Higher Education.</p>		



<b>Cole Clark</b>	<b>Regional Practice Leader</b>
	
<b>Education</b>	Cole earned a Bachelor of Arts from Rhodes College, and completed a program abroad in fine arts and literature at St. John's College at Oxford University.

<b>Donald Parr</b>	<b>Client Relationship Executive for the Commonwealth of Virginia</b>
	<p>Donald is a Managing Director helping Deloitte clients in the mid-Atlantic region of the United States. Donald serves as the Client Relationship Executive for the Commonwealth of Virginia in Deloitte Consulting practice.</p> <p>A lifelong Virginia resident, Donald's career has centered around public service and working with the Commonwealth of Virginia. As a senior executive with over 20 years of experience in supporting state governments, he brings his knowledge and experience in state government to build long lasting and strategic partnerships with the state, local and Higher Education institutions. Donald is committed to delivering innovative solutions to the Commonwealth of Virginia.</p>
	
<b>Education</b>	Donald earned a Bachelor of Arts from James Madison University.

## Service Continuity (RFP Section XI.1.d)

### RFP Reference: XI.1.d Statement of Needs

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.

As part of our staffing approach, we plan to take full advantage of multiple resource pools of local and domestic resources located within the Virginia region of our Deloitte practice. We will make all staff identified for key roles and other roles as appropriate on Day 1 of any engagement, and staff every functional role through a mix of onsite and remote resources throughout the course of the engagement or as desired by Mason. Our goal is to provide a comprehensive and flexible team that can adapt as we approach different project stage-gates and project needs in accordance with the needs of Mason. The Deloitte team will be comprised both technology experts with experience from similar past projects and specialized resources with experience under each service area for Mason.

Our resource management approach includes processes for acquiring, developing, and managing team members for any engagement. Any scenario will be planned for and managed throughout the life cycle. Team members will be provided orientation and onboarding for quick ramp-up. Many may need additional training to prepare them to perform their roles effectively. This training will be identified and planned during initiation and managed throughout execution.

One of Deloitte's strengths in the marketplace is our deep pool of skilled resources. Our experience with large-scale projects require us to be agile in scaling up and down, the required resources needed to meet project demands. We do this through our initial planning, and throughout each phase of the project. In each case, our goal is to make the most efficient use of our resources, such as re-allocating resources to other workstreams, introducing new resources, or rolling off resources where appropriate.



In addition, processes are in place to appropriately manage resources and their capacity. This occurs at the team and individual resource level. Integral to work plan management, work activities are used to plan the team's capacity, determine the team's current workload, and then evaluate if the team has enough capacity to complete the work. These tasks provide the team with data to determine if the workload they are agreeing to is reasonable and helps them avoid overcommitting themselves and endangering the quality of the solution.

Considering the scope of this RFP we are providing a sample team responsibility, structure and an overview of our resourcing model that will be used at Mason to support upcoming engagements.

Roles	Responsibilities	Deloitte	Mason
Project Management	Overall design, quality, and execution of Cloud Infrastructure Implementation	Primary	Support
	Establishing Architecture guiding principles	Primary	Support
	Managing Cloud Provider related resources and execution	Primary	Support
	Managing Existing Hosting Provider Contracts and Execution	Not Applicable	Primary
	Coordination between teams including project and Cloud Service Provider including status reporting	Primary	Support
	System Cutover and Contingency Plans	Primary	Support
	Provisioning and Configuring Cloud Services	Primary	Support
	Cloud Migration Plan	Primary	Support
	Executing Cloud Migrations	Primary	Support
	System and Regression/Integration Testing	Support	Primary
Migration	Ongoing project activities including issue troubleshooting and resolution, environment provisioning, refreshes, and scripting for automation	Primary	Support
	Functional and Technical Customizations of the In-Scope Applications	Primary	Support

Roles	Responsibilities	Deloitte	Mason
Network Architect	Network Design and Implementation	Primary	Support
	Network provisioning including VPN connectivity, VCN, High Availability, and Network Security	Primary	Support
	Cloud Architecture design including Network, Backup and Recovery, and Disaster Recovery	Primary	Support
Cloud Architect	Implementing Backup and Recovery and Disaster Recovery infrastructure and processes	Primary	Support
	Executing Performance and DR Testing	Primary	Support
Cyber Risk	Security Planning	Primary	Support
	Cyber Risk Assessment	Primary	Support
	Security Implementation	Primary	Support
	Support for ongoing project activities including issue troubleshooting and resolution	Support	Primary
Business	Executing and approving Regression/Integration Testing	Not Applicable	Primary
	Support Performance and DR Testing	Not Applicable	Primary
	Support System Cutover	Not Applicable	Primary
	Reviewing Performance Testing Results	Not Applicable	Primary

Figure 24 – Proposed Roles and Responsibilities of Deloitte and George Mason University

A sample proposed team structure is listed below. This comprises of onsite and remote resources located within the US. The right mix for any engagement will be decided based on Mason's requirements.

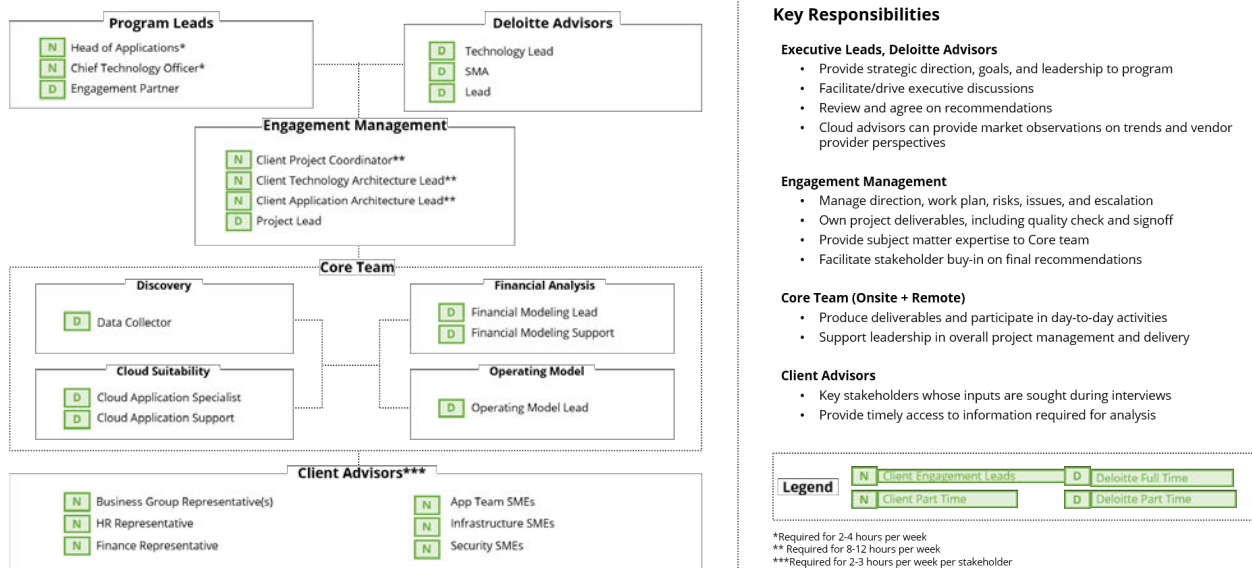


Figure 25 – Proposed Team Structure



## Cost of Available Services (RFP Section XI.1.e)

### RFP Reference: XI.1.e Statement of Needs

Describe services available from your firm and/or partners and associated costs. Examples of services that could be included are:

- |       |   |
|-------|---|
| i.    | Implementation                          |
| ii.   | Development                             |
| iii.  | Project Management                      |
| iv.   | Architecture and Design                 |
| v.    | Capacity Planning                       |
| vi.   | Installation and Configuration          |
| vii.  | Performance and Scalability             |
| viii. | Conversion                              |
| ix.   | Monitoring, administration and upgrades |
| x.    | Operations metrics                      |

Deloitte's capabilities across the entire business and technology portfolios will help address each service requirement as stated within RFP Section XI.1.a (Statement of Needs). Our breadth of expertise spans across all service areas requested by Mason. Below is a description of our services and capabilities:

### Business Management Services

**Operational Assessments:** Analyze processes and procedures of Mason and perform reliable and consistent evaluations across a variety of functions to improve operational efficiency across the organization

- **IT Governance:** Enhance the current governance structure across Mason to effectively support Mason IT objectives and the evolving technological needs of the University, including strategic direction, customer service, data governance, service excellence and performance management across both central and federated IT units.
- **IT Talent:** Enhance Mason's current talent management practices to enable the ability to remain competitive in the market, attract and retain top talent, and improve overall career satisfaction
- **IT Finance:** Enable Mason IT's ability to sustain appropriate funding to facilitate the long-term delivery of quality services and align funding sources (e.g., chargebacks and technology fees) with the true cost of delivering services across the campus
- **Technology Capabilities:** Develop a common perspective for the future of technology enabling Mason to modernize current infrastructure, remain ahead of the evolving technological curve, and satisfy the immediate and future needs of the campus
- **IT Security:** Enhance controls and infrastructure in place to protect information against cyber threats and vulnerabilities, contributing to operational efficiency and cost effectiveness across the campus
- **IT Service Management:** Enable the ability to continually evaluate and improve service delivery practices with clearly defined, measurable, and relevant metrics and to support effective and efficient delivery of the right mix of services

**Business Process Improvements:** Enhance and streamline processes as needed with a focus on customer service and support of end user needs

- **Robotics and Process Automation:** Deploy robot, cognitive, and automation technology to streamline processes, improve accuracy, and enhance the customer experience.

**Benchmarking:** Assess the performance of Mason compared to current trends in the market, their peers, and world-class organizations in other sectors outside of Higher Education and quantifying opportunities for improvement

**IT Strategic Planning:** Reduce costs, improving service, and achieving greater efficiency and effectiveness at Mason by optimizing processes, eliminating duplication, simplifying work, and leveraging technology to serve the diverse needs of campus stakeholders



**Implementation Services including Technical Change Management:** Organize and align IT operations and strategy to support Mason and its mission, values, and priorities

- Organizational Change Management and Communication: Support the adoption of new IT processes, standards, applications, and systems through focus on culture, organizational change networks, and ongoing two-way communication
- Technical Change Management: Support the approval and implementation of technical changes to applications, systems, or infrastructure to avoid disruption and achieve intended outcome

## Enterprise Application Services

**Programming:** Research, design, and implement custom IT solutions to meet Mason's needs by leveraging our experience in various programming languages. Programming projects with Mason would produce website, application, systems integration, automation, and process improvement solutions

**Business Analysis:** Review Mason's applications and services across divisions, analysis of where they are and how they function across the organization. Deloitte would offer tailored recommendations for improvements, future state, and strategic goals development

**Software Solutions Architecture:** Enhance Mason legacy technology by leveraging business architecture and development capabilities to design, build and scale integration solutions that deliver improved systems and processes for business and end users

**Enterprise Resource Planning:** Plan, analyze, and develop a system of existing or newly developed resources for Mason that can be leveraged to effectively communicate and bring together core business processes of the University

**Salesforce Development:** Analyze, develop and create custom, scalable processes and solutions for specific business needs at Mason. These solutions can provide a single, shared view of each department across Mason.

**Database Administration:** Create innovative solutions for Mason that secure business data, promote the longevity of data usage, and empower business stakeholders thorough a fluid user experience

**Website Development:** Build well-designed front-end, customer-facing portals for Mason that performs efficiently and effectively with a seamless user experience

## Enterprise Infrastructure Services

**Cloud and Infrastructure Strategy:** Provide support for the following cloud and infrastructure related services

- Cloud and Virtual Infrastructure adoption planning, roadmap, and migration strategy
- Application suitability assessments for cloud and virtualization platforms
- Operating Model implications for cloud adoption
- Business Case Analysis for cloud implementations
- Cloud Architecture assessments
- Cloud Center of Excellence Standup for ease of transition to cloud services
- Program Management for Cloud and Infrastructure Transformations / Migrations

### Infrastructure & Engineering:

- Design and Implement Infrastructure Solutions
- Data Center Design & Implementation
- Network Modernization Design & Implementation
- Virtual, Private & Hybrid Cloud Solutions
- Software Defined Data Center & Networking



- Workplace Solutions (for strategic accounts)
- DevOps Tooling & Automation
- Cloud Orchestration
- Cloud Platform Engineering – Compute, Storage & Network

## **Development and Integration:**

- Build and Implement Custom Scalable Cloud Native Applications and Platforms
- Solution Development Leveraging Cloud Services
- Containers & Micro-Services Orchestration
- Develop custom microservices and API based solutions for Cloud-to-Cloud integration of core applications
- Serverless Computing
- Traditional Enterprise Application Integration (EAI) in the Cloud
- API Management

## **Cloud Migration:**

- Cloud Migration & Modernization Services
- Remediation Services to make applications Cloud Ready by replacing proprietary software stack with Open Source or Cloud PaaS
- Migrate traditional DB's like Oracle, DB2 etc. to Cloud Native technologies AWS RDS, Mongo DB etc.
- Transform Monolithic Applications to Micro-Services-based Cloud native applications and platforms
- Containerization & Migration to Serverless Computing
- Re-Host (Data Center to Cloud)
- Re-Platform (Unix to Linux, MF to Linux)

## **Cloud Managed Services:**

- Cloud infrastructure management and service delivery
- 24/7 Service Management with committed SLAs
- Cloud Management Platform (CMP)
- Cloud Automation and DevOps support
- Cloud Cyber Security
- Risk and Compliance
- Service Reporting and Cloud Cost Optimization
- Monitoring, Patching, Back-Up and Disaster Recovery

## **Project, Program, and Portfolio Management Services**

Our Project, Program, Portfolio Management discipline helps our people focus on clients' business problems and solutions while delivering high-quality results on time and on budget and reducing project risk. We offer three broad capabilities within this domain.

**Estimation:** Associate efforts to project scope, delivery approach, and timeline. Following capabilities are offered:

- Helps provide an accurate, consistent, and defined way to estimate the effort required to deliver a solution
- Uses credible parametric techniques based on years of historical data
- Uses an Agile Framework to support estimation and an understanding of epic scope using relative estimates



- Includes direct alignment between the estimate and work plan; backlogs facilitate team capacity management throughout the project
- Helps accelerate project launch and initiation

**Project and Program Management:** Provide the framework for how projects will be planned, executed, monitored, and controlled throughout the life of the project whether using a Waterfall or Agile delivery approach

- PM framework supports activities to plan, manage, and close a project and a program
- Scope management processes confirm that focus is maintained on delivering scope and objectives
- Work plan management framework confirms that the right work is managed at the right level
- Risks and issues management processes are well established and help identify and resolve risks and issues before they affect the project or program
- Resource management processes help acquire, develop, and manage team members

**Quality Management:** Promote the execution and delivery of high-quality solutions by providing checks and balances against our PM and delivery standards. The QM and PM activities are integrated throughout the discipline

- Quality planning identifies quality objectives and approaches to satisfy quality standards
- Quality assurance evaluates overall project and program processes and tools
- Monitor and control quality approaches determine compliance
- Quality support involves outside specialists who provide additional oversight and project support to the project and program

## Cyber and Security Services:

### Adversarial Simulation Services:

- Leverages advanced cyber intelligence: Acts based on multiple threat sources, threat actor tactics, and actual events that are occurring in industry
- Evaluate effectiveness of security controls: Tests your cyber team's breach response time and the effectiveness of security controls, resulting in improved detection, prevention, and response capabilities
- Boundaries: Goes beyond the network perimeter to consider third parties, vendors, cloud providers, contractors, as part of the attack surface
- Addresses human factor of cyber security: Coverage beyond just technology to include the human element of cyber security (e.g. insider threat, social engineering, phishing)

### Cloud Infrastructure Services:

- Perform vulnerability scans on infrastructure operating systems and security configurations
- Configure SIEM and integrate log sources for continuous monitoring
- Maintain security policies and rules on network security appliances and cloud resources
- Perform host base scanning on all managed resources
- Provide incident response and alerting support for managed resources

### Threat Management:

- Increase operational efficiency of SOC services
- Apply industry knowledge and lessons learned and data-driven, feedback on operations to development/business team for process simplification
- Reduce outages through more preemptive maintenance and monitoring



- Provide prioritized recommendations to automate manual, time consuming processes based on service requests and incidents
- Analyze operations data and business outcomes to identify/resolve issues and introduce enhancements to achieve SOC goals

## **Cyber Reconnaissance:**

- Baseline your enterprise cyber traffic and behavior
- Uncover potential risk exposures by assessing the external domain footprint for both normal and abnormal behaviors and identify communications of interest over 90days of activity leveraging our tailored tradecraft
- Baseline the attack surface area and affiliated personnel, to include job title data, government agency affiliations, use of technologies, and associated locations
- Gain insight into current business operations, information sources, and administrative functions that reveal the attack surface for tactics such as social engineering

**Cost of Services:** Considering the nature of this RFP, Deloitte has provided a resource pricing matrix in Table 16. Each service requested by Mason will be priced accordingly while taking into account the duration and scope of the engagement.

## **Training and Documentation (RFP Section XI.1.f)**

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**RFP Reference: XI.1.f Statement of Needs**

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

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Deloitte has years of experience developing and facilitating training across the Higher Education landscape, as part of our Organizational Change Management (OCM) function. For effective and fast time-to-results, we will engage the user community by facilitating a training plan developed in close collaboration with the Mason Program Manager.

The training/curriculum plan will deliver easy-to-use training materials and convey leading practices that best support the solution. The training content will consider leading practices, lessons learned, FAQ sessions, and business rules. We will design, develop, execute, and evaluate the specific training curriculum and delivery method with the release schedule, communications plan, and project priorities. The training plan will include a training program roadmap that will guide and inform future training activities to educate campus-wide users and stakeholders on the specific solution and related processes. With this, Deloitte will undertake the following training activities:

- Conduct a training needs assessment with Mason input to identify training goals linked to learning objectives, user roles, performance gaps, prioritized training needs, training details (e.g. location, delivery methods, number of students) and learning evaluation methods and criteria.
- Develop a user-role-based training plan informed by the training needs assessment and inclusive of a curriculum description for user roles as well as a detailed training plan containing optimal training guiding principles; training roles and responsibilities; training audiences, current capabilities and facilities; training development principles and tools; analysis and description of training delivery methods and vehicles; inclusive list of recommended training deliverables; training logistics and support plan; and a training timeline.
- Develop and deliver the user-focused, easy-to-use, role-based, and 508-compliant training and “how to” quick reference guides according to sponsor training protocols.



- Evaluate training based on the learning evaluation methods/criteria identified in the training needs assessment for continuous improvement

The following table is an example of some of the types of technology solution training we will deliver in coordination with Mason project leadership.

Type of Course	Description	Supporting Materials	Location	Number of Attendees
<b>Instructor Led User Training</b>	Formal training facilitated by Deloitte which guides users through system activities specific to their needs, through a variety of lectures, group activities, and hands-on exercises providing real-world experience for which participants get formal learning credit	Materials for in-person sessions which combine system screen captures, MS PowerPoint, video, process-specific-simulations, and animated graphics	Onsite or Remote	Up to 30
<b>Brown Bag Facilitated Learning Exercises</b>	Informal, info sessions facilitated by Deloitte and sponsor PM teammates which guides users through system activities specific to their needs as well as hands-on exercises providing real-world experience	Materials for in-person sessions which combine system screen captures, MS PowerPoint, and process-specific-simulations	Onsite or Remote	Up to 25
<b>Online Tutorials by Role</b>	Provides an overview of key activities for each role in the process	Online Repository and communications to point users to the materials	Online	Unlimited
<b>Role-Based User Guides</b>	Documents that outline process responsibilities and tool instructions based on user roles	Online Repository and communications to point users to the materials	N/A	Unlimited

Table 12 – Examples of Technology Solution Trainings Deloitte Delivers

Deloitte will coordinate across training, change management, and communication activities to address key integration points and work with the Mason to build sustainment capacity past go-live. Deloitte sets expectations from the beginning, defining a clear vision and objectives for each project, key to any successful project.

## Recent Projects (RFP Section XI.1.g)

### RFP Reference: XI.1.g Statement of Needs

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.

The following references are for existing customers where we have provided comparable services to those outlined in the RFP.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

### Client Reference #1

**ISSUE:** The University of Colorado (CU) is a public research University and the flagship University of the state of Colorado with more than 30,000 students. In 1<sup>st</sup> quarter 2019, CU engaged the Deloitte team to conduct a system-wide IT assessment, the scope of which included centralized and distributed IT across the following



member entities: CU system office, CU Advancement, University of Colorado at Boulder (CU Boulder), University of Colorado Denver/ Anschutz (CU Denver/ Anschutz), and University of Colorado Springs (UCCS). Of those, CU Denver/ Anschutz has an RCM budget model and UCCS is implementing one.

**SOLUTION:** Deloitte began this effort by assessing the current state, inclusive of an executive presentation, that provided CU with an objective assessment of the current state of its IT operating model across four campuses and also the system office. The current state report provided an initial representation of the distribution, duplication, degree of risk, and opportunities for service improvement in IT operations across CU. Deloitte crafted a future state design, inclusive of an executive presentation, that addressed the major findings from the current state report and provided CU with a future state IT vision and model by which roles and responsibilities across the system were clearly established, resources would be shared, risk would be reduced, and decisions would be more quickly and deliberately executed across campuses. Connecting all the dots in the transformation journey – from the need (current state analysis) to the desired outcomes (business results), Deloitte developed a comprehensive implementation and change management roadmap for CU. The roadmap identified a master timeline for sequencing implementation, change management considerations and approach, and metrics for measuring success. The roadmap identified a master timeline for sequencing implementation, change management considerations and approach, and metrics for measuring success.

**IMPACT:** The role of data in enabling strategic campus initiatives emerged as a consistent theme during interviews and analysis of technical documentation. For example, CU Denver/ Anschutz has and UCCS is moving towards an RCM budget model, in turn requiring institutional data such as enrollment and financials to be reliable and easily accessible. Student success initiatives at each campus required clear governance, definitions, and access to data. Deloitte's recommendations provided a pathway towards better data, integrations, and reporting that would support these use cases and others. Acknowledging the role of IT in supporting CU's academic, administrative, and research priorities, CU has moved quickly to initiate the implementation of the first phase of Deloitte's recommendations. The system response to COVID-19 has reinforced the need for a more resilient, efficient, and effective IT operating model which the system is now underway in realizing.

## Client Reference #2

**ISSUE:** The University of Southern California (USC) is one of the leading private research universities in the nation with 44,000+ students. USC's network has historically been structured as several flat networks that now suffer from multiple performance and management issues. The technology environment has numerous gaps related to efficiency, effectiveness, and information security. With the desire to provide network and security services worthy of a top research University, USC engaged Deloitte to develop a strategic roadmap for a holistic IT Transformation to meet growing and changing demands for central IT services across campus but also one that could architect and implement a world class networking solution in the 3<sup>rd</sup> quarter 2017.

**SOLUTION:** Deloitte proposed a two-phased approach, with Phase 1 focused on developing a high-level design for the new network architecture and planning for the implementation. Phase 2 includes the low-level design and implementation. The implementation project includes upgrades to the data center, enterprise routing, network security, and network access in 282 University buildings. Deloitte's team—comprising network architects, wired and wireless engineers, network security specialists, and project managers—both manages the project and implements the next-generation network design. Deloitte has designed an industry-leading Spine-and-Leaf network architecture to provide flexibility, scalability, and higher performance.

**IMPACT:** The new network architecture utilizes industry-leading practices to greatly improve network performance, maintenance, reliability, and security across the campus and data center. It is flexible to support emerging technologies, including cloud computing and Internet of Things. It also provides the network segmentation required to effectively separate and protect the University's diverse user population and assets.



## Client Reference #3

**ISSUE:** The University of Virginia (UVA) is one of the oldest public universities in the United States, which educates 24,000 students across 11 schools and supports a workforce of over 16,000 employees. Despite the growing complexity and impact of the institution, it was operating on Oracle EBS as its legacy financial system. Implemented in 2001 Oracle EBS no longer meets requirements for management reporting or efficient business operations. UVA recently went live on Workday HCM, including Payroll. The University needed to determine the best path forward for finance and selected Deloitte to help it assess its current state, evaluate alternative ERP options (i.e., Workday Financials versus Oracle Financials Cloud) and estimate the TCO of a finance strategic transformation initiative in 2<sup>nd</sup> quarter 2018.

**SOLUTION:** Deloitte assisted UVA with the development of a business case that included a roadmap for the implementation of Workday Financials (Workday FIN) and a total cost of ownership model (TCO). We helped UVA determine the best ERP option for supporting their transformation goals. We developed a recommended deployment strategy for Workday Financials that included a readiness phase designed to position UVA for a successful implementation. We developed the business case, including a TCO that included information on one-time costs and a projection for on-going operating costs over the next ten years.

**IMPACT:** For UVA, the best path forward consisted of a Workday-enabled finance strategic transformation. UVA gained insights into the complexities and risks associated with the implementation and developed a tailored approach for getting ready that will position them for success and help them achieve their vision and goals. Deloitte also developed the business case, estimated the costs and helped UVA executives gain broad-based support for moving forward.

## Client Reference #4

**ISSUE:** The Virginia Community College System (VCCS) oversees a network of 23 community colleges in Virginia, which serves more than 233,000 residents working toward two-year degrees and an additional 170,000 students in workforce development services and customized non-credit courses. In 2<sup>nd</sup> quarter 2018, VCCS engaged Deloitte to assess their IT operating model and provide recommendations to enable their central IT organization, Information Technology Services (ITS), to more effectively support their community college members.

**SOLUTION:** Deloitte conducted quantitative and qualitative analyses of the IT operating model and service effectiveness, including input from 28 interviews, two (2) focus groups, four (4) VCCS presidents, and a survey of 50+ ITS staff members. To begin the development of the future state, Deloitte facilitated an interactive half-day session for the 23 presidents of VCCS colleges to begin the inclusive work of developing a new IT governance system. Building on current state findings and insights from college leaders, Deloitte designed the future state of IT governance and ITS' organization, business operations, and technology services. Deloitte provided a three-year implementation roadmap with 19 recommendations for how ITS could centrally steward IT resources across the system, and reliably, cost-effectively, and transparently deliver core infrastructure and services.

**IMPACT:** The future state governance and funding model was designed collaboratively, based on effective approaches used by universities and leading-edge IT organizations and the priorities and needs of VCCS. Enterprise governance of IT will enable VCCS to complement the need for broad and diverse stakeholder input with balanced and representative decision-making. A more streamlined funding model will allow for better management of IT costs, a reduction in duplicative resources and spend, and improved transparency and coordination among IT customers. A redesigned organization model provides role clarity, both within and around ITS, and improved business operations and visibility into the ownership of issues and resolution. ITS is now responsible for a clear technology roadmap, enabling colleges and functional areas to strategically plan for investments. A redesigned organization model provides role clarity, both within and around ITS, and improved



business operations and visibility into the ownership of issues and resolution. ITS is now responsible for a clear technology roadmap, enabling colleges and functional areas to strategically plan for investments.

## Knowledge Transfer (RFP Section XI.1.h)

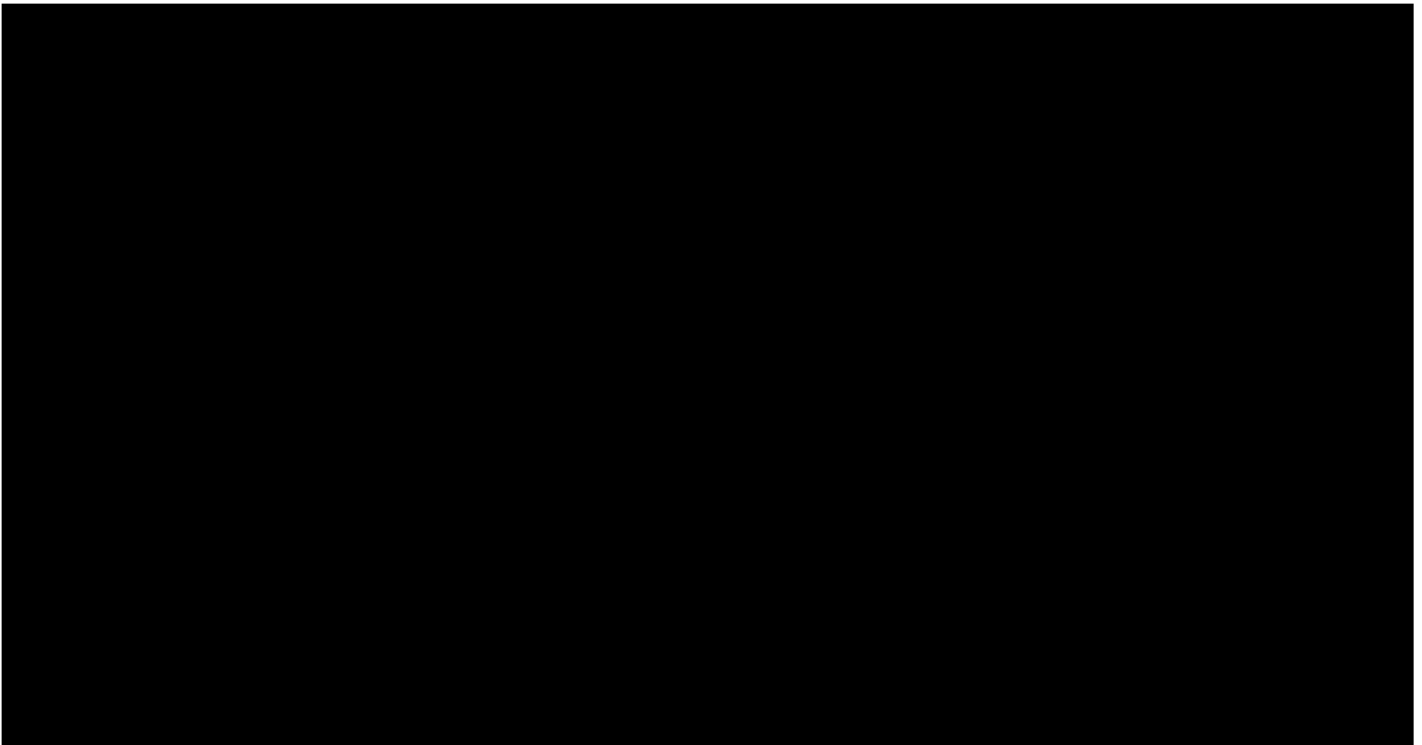
RFP Reference: XI.1.h Statement of Needs

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

We have engrained Deloitte's approach to transition training and knowledge transfer into the Plan, Execute and Verify phases of our EVD methodology. This is equipped with proven knowledge transfer activities reducing dependencies for formal walkthroughs and other resource intensive activities.

To track and document knowledge transfer for each Transition Area, we build a Service and Function Migration Plan that groups each service and function into Transition Components within the Transition Area. The Service and Function Migration Plan begins with a summary of our understanding, the criticality of the process to business operations, relationships to other process, knowledge transfer complexity, monitoring processes to confirm current production operations, and a risk assessment. It is a living document during knowledge transfer, which is revised and updated after each knowledge transfer activity and becomes an artifact which we refer to during readiness review, and during initial operation and beyond as a quick reference guide.

Our approach to knowledge transfer focuses on understanding a "day in the life". This gives us insight into what a typical team member would need to know to execute a service or function. When we review documentation and participate in other knowledge transfer activities, we are not only reviewing a process on paper, we are validating our knowledge to understand what issues might occur, and what steps we need to take to resolve them.



The following table describes the types of knowledge transfer activities that we utilize in our transition approach.



Transition Activity	Description
<b>Documentation Review</b>	Documentation review consists of our team's self-review of system documentation, such as management plans, process guides, and functional and technical design documents. This gives a baseline understanding of the system and foundation to identify defects and improvement opportunities.
<b>Q&amp;A Sessions</b>	This activity entails sessions where our team members ask targeted, clarifying questions about service and function execution and obtain answers after documentation review or other knowledge transfer activities have been conducted. Rather than broad trainings which start from the ground up, these sessions are intended to fill in gaps in our knowledge which could not be obtained from documentation review.
<b>Walkthroughs</b>	Walkthroughs consist of demonstrations of system functionality and architecture. We utilize walkthroughs to supplement our baseline understanding of system functionality, and take notes or record sessions, which we can refer to afterward.
<b>Training</b>	Due to walkthroughs requiring a significant amount of coordination, we minimize walkthrough requests whenever possible.
<b>Job Shadowing</b>	Generally, we find walkthroughs most effective for learning common system functions for large groups. In addition, we generally request walkthroughs to reflect "day in the life of" knowledge.

Table 13 – Knowledge Transfer Activities.

Deloitte will undertake a Knowledge Transfer approach for both functional and technical aspects of the project that will provide the right people with the right skills at the right time to conduct the transition of ownership of ongoing support activities. Knowledge Transfer activities and deliverables include:

- Assign Mason leads for each functional area early on to collaborate on a Knowledge Transfer Plan that includes Application Analysis; Team Member; Role; Role Requirements; Role Activities; Deloitte SME; Action Plan; Expected Completion Date; Baseline Skills Assessment; and Client & Deloitte Sign Off
- Develop and provide self-service access to documentation for the "AS BUILT" configuration of each application where Deloitte has provided application development services. This will include access to Business Process Flows and Definitions, Requirement Traceability Matrices, and Design/Build Documents
- Provide technology solution Go-Live accelerator implementation processes and documentation to include, but not limited to: workflows, process definitions, policy guides, checklists, best practices guides, system code documentation (as needed), and technical design documents
- Conduct weekly knowledge sharing sessions with solution architects to go over configuration parameters, leading practices, and support processes

This approach is not only cost-efficient, but also fosters a high level of collaboration, encourages confidence in Mason's internal capability, and creates self-sustainment within Mason.

## Functional Staffing Plan (RFP Section XI.1.i)

RFP Reference: XI.1.i Statement of Needs



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

Deloitte's proposed staffing plan includes dedicated staff to support Mason. When preparing our staffing plan, Deloitte plans for each project phase individually, and accounts for how each phase fits into the overall project plan and staffing model. Upon confirmation of the project start date, we will work to identify the right resources from our deep bench of Higher Education professionals with the requisite experience of delivering IT services similar to the size and scope which Mason is requesting.

Team Member	Higher Education	Governance	Applications	Infrastructure	Cyber Risk	Analytics	IT Service Management	HR, Talent and OCM
<b>Core Project Team Members</b>								
<i>Lead Principal</i>	✓	✓	✓	✓	✓	✓	✓	✓
<i>Project Director</i>	✓	✓	✓	✓	✓	✓	✓	✓
<i>Business Management Services Lead</i>	✓	✓	✓	✓		✓	✓	✓
<i>Enterprise Applications Lead</i>	✓		✓	✓			✓	✓
<i>Enterprise Infrastructure Lead</i>	✓	✓	✓	✓	✓		✓	
<i>Project, Program, Portfolio Management Lead</i>	✓	✓	✓	✓	✓	✓	✓	✓
<i>Security Services</i>	✓	✓		✓	✓		✓	✓
<b>Subject Matter Advisors (SMA)</b>								
<i>SMA: Governance, Finance and Talent</i>	✓	✓	✓	✓	✓	✓	✓	✓
<i>SMA: Cyber Risk</i>	✓	✓	✓	✓	✓	✓	✓	✓
<i>SMA: HR, Talent and OCM</i>	✓	✓	✓	✓	✓	✓	✓	✓
<i>SMA: Data and Analytics</i>	✓	✓	✓			✓	✓	✓

Table 14 – Experience of Staff

The proposed team brings together a diverse group of professionals with proven skills and experience from Deloitte's Higher Education practice. These select team members have unique skills that make them individually qualified to perform their roles; however, we believe that the team and their experiences are more powerful



than the experience of one individual. Therefore, when selecting team members, we stress both the importance of an individual's capability but also how these skills blended with others on the proposed team to bring the overall strongest sets of capabilities to Mason.

Each role plays an integral part in the day to day activities of the project, in conjunction with Mason Subject Matter Advisors and Mason peer engagement roles. The following table highlights each role and their respective responsibilities on the engagement.

Deloitte Role	Overall Time Commitment	Engagement Responsibilities
<b>Lead Principal</b>	25-50%	<ul style="list-style-type: none"> <li>Provides Deloitte Consulting leadership, resources and tools</li> <li>Leads discussions and presentations with executive stakeholders</li> </ul>
<b>Project Director</b>	100%	<ul style="list-style-type: none"> <li>Maintains overall responsibility for delivery of the project</li> <li>Monitors overall Deloitte Consulting project resources and budget</li> <li>Manages the day-to-day project activities of Deloitte Consulting staff</li> <li>Coordinates with GMU on scheduling, data collection, deliverable review and feedback for respective domains</li> <li>Oversees facilitation of focus groups and coordination with Subject Matter Advisors, as needed</li> </ul>
<b>Business Management Services Lead</b>	100%	<ul style="list-style-type: none"> <li>Manages activities focusing on the Business, Talent, and OCM, domains of the engagement</li> <li>Leads design of future state management practices along with coordination of other leads in future state operating model design</li> </ul>
<b>Enterprise Applications Lead</b>	100%	<ul style="list-style-type: none"> <li>Manages activities focusing on the Applications domain of the engagement</li> <li>Assesses technical performance and gaps and identification of strategic initiatives to remedy observed issues or support leading-edge technology capabilities</li> </ul>
<b>Enterprise Infrastructure Lead</b>	100%	<ul style="list-style-type: none"> <li>Manages activities focusing on the Infrastructure domain of the engagement</li> <li>Assesses technical performance and gaps and identification of strategic initiatives to remedy observed issues or support leading-edge technology capabilities</li> </ul>
<b>Project, Program, Portfolio Management Lead</b>	100%	<ul style="list-style-type: none"> <li>Manages activities focusing on the Project/Portfolio and ITSM and domains of the engagement</li> <li>Develops documentation and deliverables</li> </ul>
<b>Security Services Lead</b>	100%	<ul style="list-style-type: none"> <li>Manages activities focusing on the Security domains of the engagement</li> <li>Assesses technical performance and security gaps and identification of strategic initiatives to remedy observed issues or support leading-edge technology capabilities</li> </ul>



Deloitte Role	Overall Time Commitment	Engagement Responsibilities
<b>Subject Matter Advisors</b>	10-30%	<ul style="list-style-type: none"> <li>• Provide(s) operational, technical and financial expertise for respective focus areas</li> <li>• Coordinates with domain leads to provide subject-matter support across the phases of the engagement, as needed</li> <li>• Reviews work product(s) and enhances overall project output</li> </ul>

Table 15 – Deloitte Resource Roles

GMU Role	Overall Time Commitment	Engagement Responsibilities
<b>Sponsor</b>	10%	<ul style="list-style-type: none"> <li>• Overall GMU project lead</li> <li>• Reviews and signs-off on project management-related deliverables</li> <li>• Participates in developing meeting and workshop agendas</li> <li>• Assists in scheduling meetings and workshops</li> <li>• Facilitates/participates in select meetings and workshops</li> </ul>
<b>Program Manager</b>	30%	<ul style="list-style-type: none"> <li>• Brings specialized ServiceNow experience</li> <li>• Participates in discovery sessions</li> <li>• Contributes to functional deliverables</li> </ul>
<b>Domain Services Lead</b>	30%	<ul style="list-style-type: none"> <li>• Participate in and assist in facilitating select meetings and workshops</li> <li>• Contribute to functional and technical deliverables</li> <li>• Review and sign-off on functional and technical deliverables</li> <li>• Assist in presenting project readouts</li> </ul>
<b>GMU Functional Representatives</b> (Comprised of Subject Matter Experts from each Function/Process as engaged in the assessment)	20%	<ul style="list-style-type: none"> <li>• Participate in function-specific working sessions</li> </ul>
<b>Executive Sponsor</b>	5%	<ul style="list-style-type: none"> <li>• Sets project vision</li> <li>• Guides major decisions</li> <li>• Participates in key working sessions and decision-making sessions</li> </ul>
<b>GMU Steering Committee</b>	< 5%	<ul style="list-style-type: none"> <li>• Participate in key working sessions and decision-making sessions</li> </ul>

Table 16 – George Mason University Responsible Roles

Deloitte is a large professional services consultancy that includes dedicated practice areas supporting each area of focus for Mason, including but not limited to:

- Technology Strategy and Business Transformation
- Cloud/ Infrastructure
- Cyber Risk
- Data & Analytics



- Future of Work/Change Management/Communications
- Program and Project Management

We have the broadest pool of resources in the industry, ranging from IT to strategy and operations to human capital. We have 700+ staff in our Higher Education Services practice with experience helping clients manage the challenge of business and IT operating model transformation among top research universities. What this means for Mason is that we have a deep resource pool that allows us to quickly identify and staff team members with an understanding of the many facets of Higher Education and also IT transformation this project will cover.

## Subcontractor Functions and Expertise (RFP Section XI.1.j)

**RFP Reference: XI.1.j Statement of Needs**

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

Deloitte is committed to providing an equitable opportunity for Small Business, Small Disadvantaged Business, Woman-Owned Small Business, HUBzone Small Business, and Veteran Owned Small Business and Service Disabled Veteran Owned Small Business Concerns to participate in subcontracting opportunities on our contracts. Deloitte is also dedicated to the programs described in Mason's RFP and within the Commonwealth of Virginia. We will continually seek diverse suppliers and subcontractors to increase our supplier base and to participate on our contracts as we strive to provide value-added services in support of your objectives.

At Deloitte, we recognize that the government's small business subcontracting programs require the promotion of equitable opportunities for all small businesses to compete for contracts. We recognize that small businesses are a vital part of our economy. We strive to promote the participation of Virginia certified SWaM companies, in support of the delivery of products and services to Mason. As such, we have completed our small business plan (Attachment A) and plan on utilizing DLG Strategic, LLC to meet our SWaM commitments shown. Please see below for the details of DLG Strategic LLC

**SWAM Certificate Number: 807142**

<p><b>DLG Strategic, LLC</b></p> <p><b>DBA: DLG Strategic</b> Micah Dalton 1145 Gaskins Rd, Suite 109 Richmond, VA 23226 Phone: (804) 677-4005 <a href="mailto:mdalton@dlgstrategic.com">mdalton@dlgstrategic.com</a> <a href="http://dlgstrategic.com">dlgstrategic.com</a></p>	<p>Certification Number: 807142</p> <p><b>SWaM Certification Type:</b> Small Start Date: 11-01-2018 SWaM Expiration Date: 11-01-2023 NIGP Code and Description: 91800 CONSULTING SERVICES</p> <p>Pcard: Y Business Category: Consulting Services</p>
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### About DLG Strategic, LLC

DLG Strategic is a privately held Limited Liability Corporation located in Richmond, Virginia. DLG Strategic, LLC ("DLG Strategic" or "DLG") was formed with the purpose of bringing together a small team of senior leaders with deep subject matter expertise in technology, strategy, and execution. DLG Strategic focuses on strategy and operations and is a consulting firm dedicated to delivering quantifiable results to clients. We work collaboratively with client teams to achieve success through shared values. Our values are simple, and we apply them across our engagements:



- **Manage Polarities** – be aware that often what appears like competing interests are in reality interdependent activities; organizations must embrace this tension to maximize the value of each priority and avoid the trap of falling into making binary decisions
- **Respect People** – we ensure our solutions put people (i.e., customers, employees, suppliers, leaders) first to succeed with your organization
- **Expect Excellence** – as a small firm we must deliver on commitments to continue to earn the right to support our clients
- **Be Consistent** – our recommendations and deliverables will be congruent with your operations, and we will align expectations through the process to avoid surprises

We work with clients across the project and operations lifecycle, and we will engage in part or in whole to assist clients in solving business problems. With the breadth of our experience, we support root cause analysis, idea formation, program execution, and continuous improvement.

DLG believes that for any large initiative to succeed the three P's must be in place. During this engagement we will:

- **Plan** regular status conversations to ensure there are no surprises during our engagement
- **Partner** to ensure our deliverables are useful, and represent solutions that can be implemented as quickly as desired
- **Participate** with client team members to incorporate subject matter expertise that reflects the reality of the operating environment

DLG has served the Virginia Department of Transportation on a variety of strategic initiatives including the Operations Technology Cybersecurity Remediation Program, Connected and Autonomous Vehicle (CAV) Program, and the Stateside Fiber Management Program. DLG has also served Chesterfield County in the requirements development and procurement of Electronic Health Records (EHR) systems to support the mental health organization. Prior to forming DLG, the Principals had experience with clients such as University of Virginia, Virginia Secretary of Health.



Figure 27 – DLG Strategic, LLC philosophy

## Cost of Services (RFP Section XII)

### Costs of Services (RFP Section XII.a)

#### RFP Reference: XII.a. COSTS 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:

- 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/>

Deloitte hourly rates are provided in Table 16 and are subject to an annual increase 3% starting January 2022. In addition to the hourly rates, Deloitte agrees that travel expenses will be reimbursed at cost with no markup and will not exceed Commonwealth of Virginia expense guidelines and per diem rates.



Position	Onsite	Remote	Onshore Development Center
Infrastructure Architect (Senior)	\$ 358	\$ 319	N/A
Infrastructure Architect	\$ 316	\$ 277	N/A
Jr. Infrastructure Architect	\$ 180	\$ 153	N/A
Systems Administration III	\$ 316	\$ 277	N/A
Systems Administration II	\$ 280	\$ 240	N/A
Systems Administration I	\$ 208	\$ 169	N/A
Jr. Systems Administration	\$ 180	\$ 153	N/A
Database Administration III	\$ 316	\$ 277	N/A
Database Administration II	\$ 280	\$ 240	N/A
Database Administration I	\$ 208	\$ 169	N/A
Jr. Database Administration	\$ 180	\$ 153	N/A
Network Engineering III	\$ 358	\$ 319	N/A
Network Engineering II	\$ 316	\$ 277	N/A
Network Engineering I	\$ 208	\$ 169	N/A
Jr. Network Engineering	\$ 180	\$ 153	N/A
Program Management	\$ 433	\$ 393	N/A
Applications Architecture III	\$ 433	\$ 393	N/A
Applications Architecture II	\$ 316	\$ 277	N/A
Applications Architecture I	\$ 225	\$ 185	N/A
Jr. Applications Architecture	\$ 180	\$ 153	N/A
Information/Data Architecture III	\$ 358	\$ 319	N/A
Information/Data Architecture II	\$ 316	\$ 277	N/A
Information/Data Architecture I	\$ 225	\$ 185	N/A
Jr. Information/Data Architecture	\$ 180	\$ 153	N/A
Infrastructure Architecture (Senior)	\$ 358	\$ 319	N/A
Infrastructure Architecture	\$ 316	\$ 277	N/A
Jr. Infrastructure Architecture	\$ 180	\$ 153	N/A
Data Analysis IV	\$ 358	\$ 319	N/A
Data Analysis III	\$ 316	\$ 277	N/A
Data Analysis II	\$ 280	\$ 240	N/A
Data Analysis I	\$ 256	\$ 217	N/A
Data Analysis	\$ 225	\$ 185	N/A
Reporting and Analytics II	\$ 325	\$ 285	N/A
Reporting and Analytics I	\$ 225	\$ 185	N/A



Position	Onsite	Remote	Onshore Development Center
Data Warehousing (Senior)	\$ 316	\$ 277	N/A
Data Warehousing	\$ 280	\$ 240	N/A
Testing and Data Quality (Senior)	\$ 316	\$ 277	N/A
Testing and Data Quality I	\$ 280	\$ 240	N/A
Testing and Data Quality	\$ 208	\$ 169	N/A
Solutions Architecture III	\$ 464	\$ 425	N/A
Solutions Architecture II	\$ 433	\$ 393	N/A
Solutions Architecture I	\$ 225	\$ 185	N/A
Jr. Solutions Architecture	\$ 180	\$ 153	N/A
Software Development II	\$ 377	\$ 337	N/A
Software Development I	\$ 231	\$ 191	N/A
Jr. Software Development	\$ 180	\$ 153	N/A
Business Analysis	\$ 377	\$ 337	N/A
Business Analysis II	\$ 325	\$ 285	N/A
Business Analysis I	\$ 289	\$ 251	N/A
Jr. Business Analysis	\$ 180	\$ 153	N/A
Project Management II	\$ 280	\$ 240	N/A
Project Management I	\$ 225	\$ 185	N/A
Change Management II	\$ 433	\$ 393	N/A
Change Management I	\$ 225	\$ 185	N/A
Jr. Change Management	\$ 180	\$ 153	N/A
Technical Writer/Editor (Senior)	\$ 325	\$ 285	N/A
Technical Writer/Editor	\$ 289	\$ 251	N/A
Technical Writer	\$ 208	\$ 169	N/A
Jr. Technical Writer	\$ 180	\$ 153	N/A
Security Executive	\$ 310	\$ 290	N/A
Security Architect	\$ 283	\$ 243	N/A
Security Senior Engineer	\$ 256	\$ 216	N/A
Security Engineer	\$ 234	\$ 194	N/A
Security Developer	\$ 198	\$ 175	N/A
Security Analyst	\$ 187	\$ 165	N/A
Integration Engineer (Senior)	\$ 433	\$ 393	N/A
Integration Engineer	\$ 377	\$ 337	N/A
Sr Tech Lead	\$ 347	\$ 307	N/A
Business Lead	N/A	N/A	\$ 239



Position	Onsite	Remote	Onshore Development Center
Business Manager	N/A	N/A	\$ 189
Business Consultant	N/A	N/A	\$ 158
Sr. Staff	N/A	N/A	\$ 116
Jr. Staff	N/A	N/A	\$ 95
Sr. Team Lead	N/A	N/A	\$ 194
Team Lead	N/A	N/A	\$ 155
Project Manager	N/A	N/A	\$ 128
Team Member	N/A	N/A	\$ 95
Jr. Team Member	N/A	N/A	\$ 76

Table 17 – Deloitte Hourly Rate Card

## Costs of Services (RFP Section XII.b)

### RFP Reference: XII.b. COSTS OF SERVICES

Specifically address the following in your proposal:

- 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.

Deloitte will use the rates and resources mentioned in Section XII.a to provide training to technical staff and end-users. If training is requested, Deloitte will factor in training costs into each project SOW.

## Costs of Services (RFP Section XII.c)

### RFP Reference: XII.c. COSTS OF SERVICES

Specifically address the following in your proposal:

- 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. 5. The final price (all charges) paid by the customer

Please see below for a list of last 10 projects delivered and their costs of services.

#	Project Name	Type of Consulting	Original Estimated Hours	Final Hours Billed	Original Project Cost Estimated	Final Price (all charges) Paid	Notes
1	Workday HRIS	Workday Enabled Transformation	1,500.0	362.0	\$ 416,185.00	\$ 109,710.64	
2	Succession Planning	0606-1007	934.0	934.0	\$ 255,972.00	\$ 241,843.07	
3	Workday SP	Workday Enabled Transformation	504.0	96.0	\$ 138,600.00	\$ 29,519.18	
4	Digital Trans Govt & Fin	Technology Transformation & Operations	741.0	608.0	\$ 155,024.00	\$ 122,720.39	



#	Project Name	Type of Consulting	Original Estimated Hours	Final Hours Billed	Original Project Cost Estimated	Final Price (all charges) Paid	Notes
5	CWFL Leadership Support	Transformation Strategy & Design	950.0	928.0	\$ 337,900.00	\$ 306,779.19	
6	Palo Alto Proof of Concept	Cloud Infrastructure & Engineering	396.0	324.0	\$ 97,272.00	\$ 94,927.26	
7	Cyber Transformation	Cyber Strategy & Governance	2,672.0	2,580.5	\$ 614,270.00	\$ 556,592.86	
8	App Intake Supp LBR	Business of Technology Transformation	240.0	172.5	\$ 50,160.00	\$ 34,167.43	
9	Slack OCM & Governance	Training and Communications Strategy, Design	448.0	415.0	\$ 66,400.00	\$ 66,400.00	
10	Slack OCM & Gov-Ext	Organizational Strategy, Design and Transformation	516.0	571.5	\$ 98,460.00	\$ 116,389.50	Change order requested by client to increase hours



## Proposal Preparation and Submission Requirements: Specific Requirements (RFP Section XIII.B)

### Procedural Information (RFP Section XIII.B.1)

RFP Reference: XIII.B.1 PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS, SPECIFIC REQUIREMENTS

Procedural information:

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

Completed and attached.

RFP Reference: XIII.B.1 PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS, SPECIFIC REQUIREMENTS

b. Return Attachment A - Small Business Subcontracting Plan.

Completed and attached.

RFP Reference: XIII.B.1 PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS, SPECIFIC REQUIREMENTS

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

Deloitte's payment preference is stated in [Payment Terms/ Method of Payment \(Section XVI\)](#).

RFP Reference: XIII.B.1 PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS, SPECIFIC REQUIREMENTS

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.

Our exceptions are listed in an attached document titled "GMU RFP\_1700-21 T&C Exceptions Document.pdf"

### References (RFP Section XIII.B.2)

RFP Reference: XIII.B.2 PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS, SPECIFIC REQUIREMENTS

No fewer than three (3), preferably from other comparable Higher Education institutions to which your firm is/has provided trademark licensing services which are similar in size and scope to that which has been described herein, that demonstrate the offeror's qualifications.

Deloitte has been serving the Higher Education community for more than 90 years. As one of the firm's faster-growing industry sectors, Deloitte is making investments in areas that allow us to truly make sustainable impacts to the Higher Education clients we serve. Throughout the [Statement of Needs \(RFP Section XI.1\)](#), Deloitte has outlined the types of services that Deloitte has provided to other Higher Education institutions.

[REDACTED]

While Deloitte excels in large and complex environments, transforming business processes and driving change adoption, an institution's fit with Deloitte is more about the philosophy of transformation rather than the type and size of the institution.

### Approach Towards Fulfilling Objectives and Services (RFP Section XIII.B.3)

RFP Reference: XIII.B.3 PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS, SPECIFIC REQUIREMENTS

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.

Deloitte, a recognized global leader in Information Technology (IT) strategy and consulting, has been serving Higher Education for over nine decades, from large public research institutions to small, private, liberal arts



colleges, state systems of higher education, academic medical centers, community colleges and Higher Education research foundations and organizations. Our dedication to serving the Higher Education community, delivering quality impactful services, has allowed us to develop strong and trusted working relationships with C-Level Higher Education leaders across a multitude of institutions.

Our approach toward fulfilling Mason's objectives and providing services can be found in the [IT Service Delivery Approach and Methodology](#) section. Each of the five corporate competencies discussed have unique characteristics aligned to the unique challenges. Our Advise-Implement-Operate (A-I-O) engagement model is designed to optimize our services across these three key areas:

- **Advise.** Helping our clients as they navigate increased complexity, enabling successful decision-making.
- **Implement.** Provides our clients with expertise when improving or building new capabilities through critical infrastructure and systems investments.
- **Operate.** Providing our clients with professional services focused on operating and managing increasingly high-value-add elements of our clients' business, enabling us to deliver measurable and meaningful results in new and unique ways.

By leveraging this unique A-I-O model we can better position ourselves as a long-term partner for our clients to deliver cost-effective, high-value services. We strive to deliver world-class quality through our [Quality Management \(QM\)](#) approach, as described in the Project, Program, and Portfolio Management Services section. Each individual engagement includes this approach and is represented by either our deliverables/milestone-based billing terms, where our clients must sign-off on these deliverables/milestones before we can issue a bill or agreed upon service levels that must be maintained before penalties are assessed.

## Experience and Qualifications (RFP Section XIII.B.4)

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### RFP Reference: XIII.B.4 PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS, SPECIFIC REQUIREMENTS




A written narrative describing the offeror's experience and qualifications in providing trademark licensing services 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).

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The Deloitte project team will bring over 100 years of collective Higher Education consulting experience to support Mason. The Deloitte team will be led by James Qua and Richard Johnson, who have each worked with scores of complex, public and private universities for the last 15 years. James will serve as the Project Partner, providing oversight to the Deloitte team and ensuring that Mason has unfettered access to the best that Deloitte has to offer. Richard will serve as the Project Director, leading the fieldwork, coordinating the Deloitte core team and subject matter advisors, and liaising with Mason project leadership.


The core team will also include a lead for each of the services outlined in RFP Section XI.1, Statement of Needs – business management services (Ram Srinivasan), enterprise applications services (David Lindstrom), enterprise infrastructure services (Juan Lazcano and Jesse Lee Holbrook), project/program/portfolio management services (Alex Diamond), and security services (Delvin Huffman). Brief biographies of the core team members are provided below (additional resources may be added to support the engagement).




James Qua	Engagement Principal
	<p>James is a Principal with Deloitte's Government and Public Services Technology practice with more than 20 years of Enterprise Architecture and IT infrastructure transformation experience. He has extensive experience working with Higher Education institutions in developing transformative technology strategies coupled with leading the delivery of large IT transformation programs.</p> <p>[REDACTED]</p> <p>James has deep expertise in application rationalization, enterprise architecture and cloud/infrastructure transformations in the most complex Higher Education environments.</p>
[REDACTED]	<p>[REDACTED]</p> <p>[REDACTED]</p> <p>[REDACTED]</p>
Education	<p>James received his Master of Business Administration in General Management from Pepperdine University and his Bachelor of Science from California State Polytechnic University, Pomona.</p>
Richard Johnson	Higher Education Technology Trends Advisor
	<p>Richard is a Managing Director in Deloitte's infrastructure transformation practice with over 25 years of experience in delivering large scale complex projects for clients across various industries. Richard possesses deep expertise in data center, network architecture and engineering, and hybrid and public cloud.</p> <p>Richard has led projects focused on IT process operations, strategic planning, cloud migration strategies, storage strategies, network architecture and strategies, and disaster recovery plans.</p> <p>[REDACTED]</p> <p>In addition, Richard led large-scale technology deployments at a major global brokerage firm, to include virtualization, cost reduction, post-merger integration of data center and technology synergies, business continuity and Network Operation Center (NOC) design/re-organizations.</p>
Education	<p>Richard received his Bachelor of Business Administration in Management Information Systems from Iona College.</p>
Ram Srinivasan:	Business Management Services Lead
	<p>Ram is a Manager in in Deloitte's Technology Consulting practice with more than 10 years of experience working in the state and local government, Higher Education, and nonprofit sectors. He has performed 11+ IT assessment and transformation projects to identify and address gaps between current state operations and the desired future state that would improve the overall reliability and effectiveness of IT services and create multi-year IT strategic roadmaps that align to the business strategy. Ram has led multiple workstreams on both IT assessment and transformation implementation projects, including overseeing Talent Management, Finance, Governance, and Service Management, along with serving as the day-to-day project manager.</p>





<b>Ram Srinivasan:</b>	<b>Business Management Services Lead</b>
<b>Previous</b> [REDACTED]	[REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED]
<b>Education</b>	Ram received his Master of Business Administration and Master of Public Affairs from the University of Texas at Austin and his Bachelor of Arts in Economics and Philosophy from Trinity University in San Antonio.


<b>David Lindstrom</b>	<b>Enterprise Applications Services</b>
	David is a Senior Manager in the Deloitte Digital practice with more than 10 years of experience implementing, maintaining, and modernizing applications and systems for private and public sector clients, including 5 years of experience serving as an IT Service Manager. David has lead engagements involving ERP (SAP, NetSuite, and Oracle), CRM (SAP and Salesforce), Digital Marketing (Adobe, Salesforce), and a variety of custom applications, in roles that include managing day-to-day operations, project management, quality management, resource management, and a great deal of stakeholder engagement and communication.
[REDACTED]	[REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED]
<b>Education</b>	David received his Bachelor of Science in Economics from California Polytechnic State University.

<b>Juan Lazcano</b>	<b>Enterprise Infrastructure Services</b>
	Juan Lazcano is a Senior Network Architect with deep skillsets in transforming and revitalizing enterprise networks. His CCIE within Routing & Switching came about through years of learning campus networks and WAN architectures. Strong interests in perimeter security, remote and site-to-site VPN access, and 802.1X policy enforcement led him to a second CCIE, in Security. With the proliferation and importance on Data Center networks for organizations across the country, Juan gained much needed exposure in network and storage architectures that allowed him to earn a third CCIE. Overall, his project experiences have helped him shape his understanding of modern networks in ways that literature cannot demonstrate, and it also has enabled him to be able to articulate technical complexities in an appropriate way to a variety of different audience members.
[REDACTED]	[REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED] [REDACTED]
<b>Education</b>	Juan received his Bachelor of Science in Decision and Information Sciences from the University of Florida.



Jesse Lee Holbrook	Enterprise Infrastructure Services
	<p>Jesse is a Manager and a Virtualization Architect within Deloitte's Solutions Network Architecture group. His career has been marked with amazing success driving operational efficiencies, lower Total Cost of Ownership and more predictable Capital Expenditure spending by leveraging my background in automation and emerging virtualization technologies. Jesse has extensive hands-on experience with storage, hardware, and virtualization technologies over 10 years, which allows for a unique and fresh perspective on cloud computing and supporting physical infrastructures.</p> <p>Jesse's experience has been in the hosting industry, where he has interacted with a wide range of technologies and built an advanced understanding of the end user experience and creative ways in which technology can be leveraged to deliver exceptional experiences.</p>
[REDACTED]	[REDACTED]

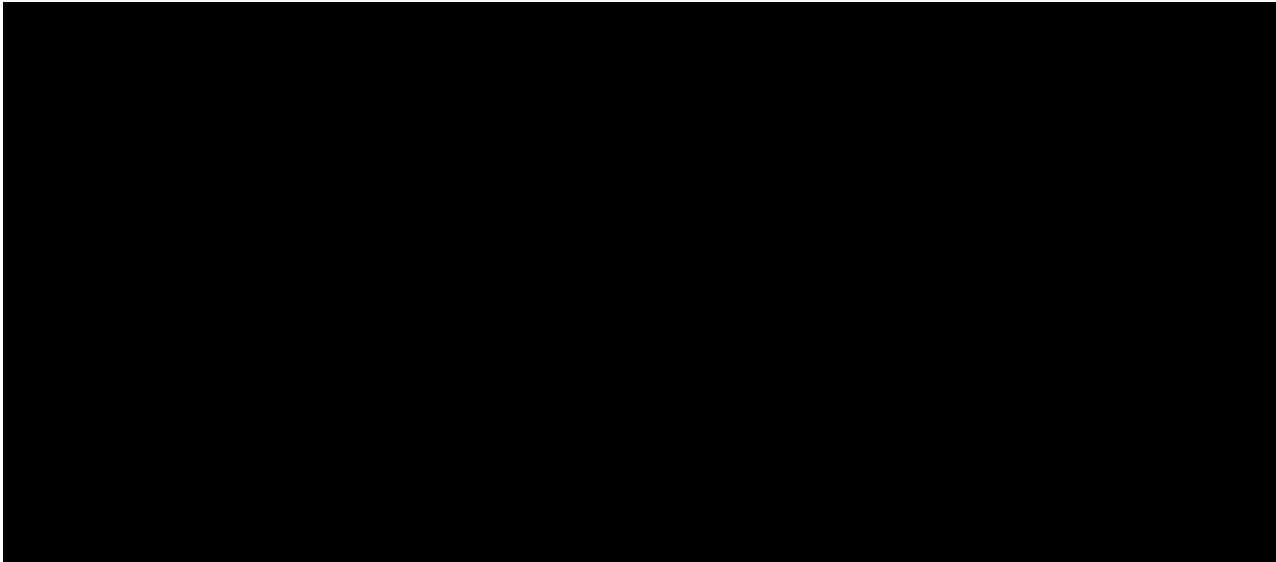
Alex Diamond:	Project/Program/Portfolio Management Services
	<p>Alex is a Manager in Deloitte's Technology Consulting practice. He has more than 20 years of experience in a wide array of IT strategy and transformation projects across the Higher Education, federal, and private sectors and specializes in IT Project Management, IT Service Management, ITSM Tools and IT Infrastructure.</p> <p>Alex delivers IT Infrastructure Library (ITIL)-based IT solutions by leveraging his industry and consulting experience. His experience also includes leading workstreams across IT process development and re-engineering, infrastructure management and support, ServiceNow implementation, and managing custom application and integration projects. Alex is ServiceNow System Administrator and ITIL certified.</p>
[REDACTED]	[REDACTED]
<b>Education</b>	Alex received his Bachelor of Science in Telecommunications Management from DeVry University.

Delvin Huffman:	Security Services
	<p>Delvin is a Senior Manager in Cyber Risk Services focusing on implementation of cloud security controls, security of application workloads and implementation of identity access management controls across multiple cloud service providers (AWS, Azure). He has 15 years of experience that spans across the financial services, healthcare industry, public sector, and oil and resources industries but is currently focused on State Government cloud migration projects.</p> <p>Delvin has focused on implementations and software development impacting enterprise security, network security, and risk and compliance. Delvin has detailed experience of delivering complex Identity and Access Management solutions through all stages including strategy, requirements definition, solution design, development, and enterprise deployment.</p>
[REDACTED]	[REDACTED]
<b>Education</b>	Delvin received his Master of Science in Information Technology concentrating in Network Security from the American Intercontinental University and his Bachelor of Science in Computer Science from Alabama A&M University.



The core team will be supported by a collection of Deloitte Subject Matter Advisors (SMAs), who will be engaged throughout the project lifecycle as their expertise is required to inform strategy and visioning, requirements gathering, and/or roadmap creation. The SMAs bring a breadth and depth of knowledge across the various services that Mason is considering, the core administrative functions that will be covered by the eventual roadmap, the integration of business process/practice and technology in higher education, change management, and stakeholder engagement. In addition to the Deloitte SMAs, we expect to engage Mason SMAs as well over the course of the project.

As indicated in the organization chart below, we envision that Mason will develop a Steering Committee, comprised of IT and Campus leadership, to govern the work, and will assign a Mason Project Manager to work closely with our Project Director.





## Transition Plan (RFP Section XIII.B.5)

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RFP Reference: XIII.B.5. PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS, SPECIFIC REQUIREMENTS  
Provide a specific plan for implementation and transition of services from date of award forward.

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To transition services as large as Mason's, it is vital to have a provider who has the right experience, people, and methodology in not just transitioning current state, but also future state implementations and customizations. From our experiences, including running complex Business Management, Enterprise Application, Enterprise Infrastructure, Project, Program, and Portfolio Management and Cyber Security transformations with multiple Higher-Education clients, we have built a transition methodology for Mason. Our transition success stories span numerous Higher- Education, state, local, and federal agencies. Our past clients attribute these success stories to how we focus on minimizing the impact of transition to the people and the end users of affected systems and technology by leveraging our subject matter expertise and maintaining timely and effective communication.

Deloitte recognizes the importance of proper Transition Planning and an effective Transition Kickoff. We are not just transitioning existing services, but also undertaking critical application and enterprise services operations.

In our experience, the foundation for a successful transition begins upon contract award. Prior to the contract execution date, we commence pre-planning activities, so we are effective from day one. Our transition approach will support a low risk changeover of the Mason Service Provider from the incumbent contractors to Deloitte. This includes reviewing any of the incumbent provider's Disentanglement plan ( if available) so we can establish mutual expectations for support and ramp up our Transition team. The Transition team will execute our transition plan focusing on communication with staff, identifying the issues and potential barriers to transition, and working with staff and the incumbents to level set on current status. We also use this pre-planning time to prepare for resource requirements such as network, environment, and system access, and compile system and process design documentation. Early access to system environments and code repositories allows us to begin familiarizing our technical staff with Mason's specific IT environments.

The Plan and Define phase sets the stage for the rest of the transition. At the beginning of this phase, we hold kickoff meetings for the overall project, for transition, and for each Transition Service Component to align everyone to the same mission. The kickoff meeting will include appropriate stakeholders from Deloitte, Mason, and the incumbent to address the following:

- Key staff introductions, identification of stakeholders, and reporting responsibilities
- Project mission, guiding principles, and stakeholder priorities
- Initial project risks and mitigation strategies

After reaching an agreement on the high-level transition and transformation plan, we establish a well-prescribed framework to track milestones, report progress, and maintain accountability throughout the subsequent phases. Our experience with prior successful transitions shows us that breaking down the transition into logical components enables better understanding. We will align our staff with both Mason and your incumbent based off transition service components. During the Plan and Define phase, we will schedule knowledge transfer sessions by component and identify components requiring additional attention during the Transition phase. An important consideration during Plan and Define phase is identifying the level of knowledge transfer required for different services and components. Some functions require multiple deep dive sessions and job shadowing while others may be much simpler. For example, reviewing storage, network, and other physical systems to make sure that they are redundant may require extensive reviews with the technical team.

We will also review the current system infrastructure to confirm there is no single point of failure, and all the components in the system are either clustered or load balanced. Additionally, we will review your current



system and application documentation to establish an initial baseline of processes, application functionality, and technical architecture, allowing us to confirm that our transitional results do not deviate from the baseline.

**Status Reporting Approach:** During the transition period, we will create, document, and maintain a Stakeholders Management Plan and Project Communication Plan. Our first step will be to learn and utilize your existing communication processes and procedures during transition to minimize confusion and mitigate the chance that knowledge transfer will be incomplete for communications processes and procedures. While acknowledging these existing processes and procedures for communication with Mason, the incumbent vendor, and business partners and other stakeholders, we will also observe what is working and make adjustments or additions to the communication process that will help improve the process and streamline this communication between all relevant stakeholders. Timely communications for all participants, including Mason, stakeholders, incumbent vendor, end users and business partners, in this transition phase will keep all informed about the current of the transition, as well as any potential delays to the transition timeline. It is important that communication provides the transparency across all involved to maintain the transition timeline and milestones. That is why Deloitte will consistently communicate with the identified stakeholders throughout the transformation and transition period with documents such as the Transition and Transformation Status Report. Communications such as these are designed to quickly and proactively provide status of the ongoing collection, review and sharing of information that will be conducted between Deloitte, Mason and the Incumbent, throughout the transition period.

Deloitte will review the existing methods and processes to provide timely and appropriate generation, collection, distribution, storage, retrieval, and ultimate disposition of transition information. As part of leveraging the existing methods, we will recommend adjustments to these processes with stakeholders to improve these processes when needed. Storage of information that is required to be accessed by Deloitte, Mason, and incumbent vendor will be housed in an approved share site and maintained by the Deloitte transition team. All communication via email will also be conducted through Mason's approved email services.

This data collection during the knowledge transfer sessions will ultimately result in Deloitte's Assessment Report, Operations Service and Function Migration Plan and completion of the Enterprise Compute Services Readiness Checklist.

**Transition Plans and Tools:** As part of the Transition of Mason's Services from incumbent vendor to Deloitte, our team will establish a plan to manage these activities and leverage tools that we have had success in similar large-scale transition projects.

In our plan to manage transformation and transition activities, we will track these activities to validate that each area has passed through the agreed upon reviews and assessments from the 'As-Is' state to the 'To-Be' State on time. During this time, we will plan our activities with Mason stakeholders and the incumbent vendor to help confirm current day-to-day activities remain continuous, and data availability remains stable and without interruption during these activities. We will leverage current processes and tools and seek to transform processes and technology where it makes sense. Throughout these activities, we will use a group of tools to track and measure the progress of all transformation and transition activities to provide transparency to Mason throughout this timeline.

A Readiness Checklist is a detailed report that includes application readiness, knowledge transfer status, Shadowing status, Reverse Shadowing status, out of scope items identified, documentation status, technical status with gaps and issues, and critical and high defect backlog snapshot from incumbent. This document will manage and track our overall assessment of each the current system architecture and our proposed system architecture. We will score hardware components during the knowledge transfer to gauge our comfort level of information that has been shared and our understanding of how it fits into Mason's current system



architecture. This document will also help alert of areas where additional knowledge transfer or shadowing may be required.

The Deloitte team will gather information from our overall observations and document in an Assessment Review. This is not a deliverable, but a compilation of items built at the end of transition capturing findings, gaps, challenges, impact and proposed roadmap for resolving the challenges across areas (system architecture documentation, requirements, system designs, deployment procedures, technology, governance, security, etc.). The document tracks our recommendations of a roadmap for improvements that can start to be incorporated after cutover is completed and our recommended system infrastructure is kicked off.

In addition, Deloitte will utilize the Documentation Quality and Gap Analysis Assessment tool. The team assesses quality of critical transition components (Systems Requirements Documentation, Detailed Design Documentation, System help manuals, Data Dictionary, Data Warehouse Data Model, Applications Data Model, Business Rules documentation, Reference Table Values, System Configuration and Deployment Manual, List of Interfaces, Testing documentation) by giving them quality scores from 0 to 4 (lowest to highest). This document is used as an internal tracker for the Deloitte team and the outcomes are communicated through the Readiness Checklist.

## Sample Reports (RFP Section XIII.B.6)

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**RFP Reference: XIII.B.6. PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS, SPECIFIC REQUIREMENTS**

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

Sample quarterly sales report.

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See Figure 28 below for a sample sales report.



1/13/2021
SRS - Supplier Reporting System : Supplier Sales Report

**SRS - Supplier Reporting System**  
**Supplier Sales Report**

Print
Download Report

☒ General Report Information

Contract Number :  
VA-150915-DELC  
Supplier Name :   
Deloitte Consulting LLP

Dec 2020Report Date :  
F022273Invoice Number :

☒ General Sales Information

☒ SWaM Sales Information

Fees Information

Total Sales : \$2,931,500.00  
IT Contract : \$2,931,500.00  
Telco : N/A  
Staff Aug : N/A  
SOW : N/A

COV SWaM Total Sales : \$0.00

2% IFA Fees : \$58,630.00

Report Detail

IT Contract Sub-Contractor Spend Supplier Info

2 records.

Action PD / eVA#	Requesting Entity	Descr of Order	Total
EP3183303-V6-Mission# R-641-0723	DEPARTMENT OF EMERGENCY MANAGEMENT	Health360 analytics support services	\$1,874,500.00
EP3203230-V5-Mission# R-641-2401	DEPARTMENT OF EMERGENCY MANAGEMENT	VDH PMO Support	\$1,057,000.00
1			

Print
Download Report

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v: 2.0.19.0

[https://srs.vita.virginia.gov/srs\\_external/supplier\\_report\\_base.aspx](https://srs.vita.virginia.gov/srs_external/supplier_report_base.aspx)
1/1

Figure 29 – Sample Sales Report



## Financial Offer/ Considerations (RFP Section XIII.B.7)

RFP Reference: XIII.B.7. PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS, SPECIFIC REQUIREMENTS  
Provide proposed financial offer/considerations, including service pricing for licensees (retail and internal).

Deloitte has alliance and resell arrangements with many third-party software and product vendors that could be utilized if desired by GMU. For resell, the parties would need to execute an addendum to address the related resale terms and obligations at the prime contract level. Pricing and specific terms would also be established as part of the project specific work order on an as needed basis as well.

## Payment Terms / Method of Payment (RFP Section XVI)

RFP Reference: XVI. PAYMENT TERMS / METHOD OF PAYMENT

PLEASE NOTE: THE VENDOR MUST REFERENCE THE PURCHASE ORDER NUMBER ON ALL INVOICES SUBMITTED FOR PAYMENT.

Option #1- Payment to be mailed in 10 days-Mason will make payment to the vendor under 2%/10 Net 30 payment terms. Invoices should be submitted via email to the designated Accounts Payable email address which is [acctpay@gmu.edu](mailto:acctpay@gmu.edu).

The 10-day payment period begins the first business day after receipt of proper invoice or receipt of goods, whichever occurs last. A paper check will be mailed on or before the 10<sup>th</sup> day.

Option #2- To be paid in 20 days. The vendor may opt to be paid through our Virtual Payables credit card program. The vendor shall submit an invoice and will be paid via credit card on the 20<sup>th</sup> day from receipt of a valid invoice. The vendor will incur standard credit card interchange fees through their processor. All invoices should be sent to:

George Mason University  
Accounts Payable Department  
4400 University Drive, Mailstop 3C1  
Fairfax, Va. 22030  
Voice: 703.993.2580 | Fax: 703.993.2589  
e-mail: [AcctPay@gmu.edu](mailto:AcctPay@gmu.edu)

Option#3- Net 30 Payment Terms. Vendor will enroll in Paymode-X where all payments will be made electronically to the vendor's bank account. For additional information or to sign up for electronic payments, go to <http://www.paymode.com/gmu>. There is no charge to the vendor for enrolling in this service.

Please state your payment preference in your proposal response.

Deloitte prefers **Option #3** for the payment terms and method of payment.



## Appendix

Deloitte brings depth and breadth of experience in higher education, technology and Cyber Services to respond to our clients' challenges.

Our value comes from working with hundreds of institutions facing serious challenges for the future and bringing that experience to you as a trusted advisor. Beyond our deep technical experience, our firm has a robust group of dedicated Higher Education practitioners are passionate about the field, with many of our team members having served in leadership roles at universities and colleges across the country. Our team can leverage the breadth of Deloitte's capabilities across the organization, enabling us to bring real-world solutions to complex issues with a different lens.

### Qualifications and Competitive Advantages

<b>Higher Education Focus</b>	We have more than 500 practitioners dedicated solely to higher education, serving Higher Education institutions throughout the U.S. in a variety of strategic and technical engagements. Our deep expertise in the industry means that we have a strong understanding of the academic mission and shared governance culture. We can leverage this experience to work with your stakeholders and implement systems specific to Mason's needs.
<b>Unmatched IT Capabilities with SAP and Oracle</b>	In addition to unmatched technology capabilities ranging from development of local customized solutions to mobile to Cloud to deep capabilities with a variety of packages both big and small, our competitive advantage for Mason includes our highly acknowledged SAP and Oracle practices. These capabilities bring Mason the assurance needed to tackle enterprise-wide initiatives with confidence.
<b>Leading Cyber Services</b>	Unlike many competitors, we also have the advantage of our Cyber Risk Services practice, which has been recognized as a global leader in Information Security consulting, to support Mason in the cyber risk strategic thinking and careful capability planning required for each technology initiative. This provides Mason with the added assurance of risk assessment and mitigation across technology projects.

We further outline our depth and breadth across higher education, Information Technology, and cyber services below.

### Deloitte Higher Education Practice

Higher education has been a priority sector for Deloitte since the firm began supporting colleges and universities in 1913. Since then, Deloitte's Higher Education practice has cultivated strong relationships with a diverse array of institutions, including university systems, public and private colleges, community colleges, and all Carnegie classifications of research institutions.

We serve more than 200 Higher Education institutions, including **nine of the top 10 universities**; 22 of the top 25; and 65 of the top 100, according to the current U.S. News & World Report college rankings



Institutions of Higher Education face ongoing challenges, including changing enrollment demographics, skyrocketing costs, intense competition, more regulations, less public funding, and an unpredictable economy. Universities and colleges select Deloitte because of the depth and breadth of resources and experiences we bring to assist our Higher Education clients in addressing these challenges. Our experience includes both strategic

and technical implementation work on campuses across the country.



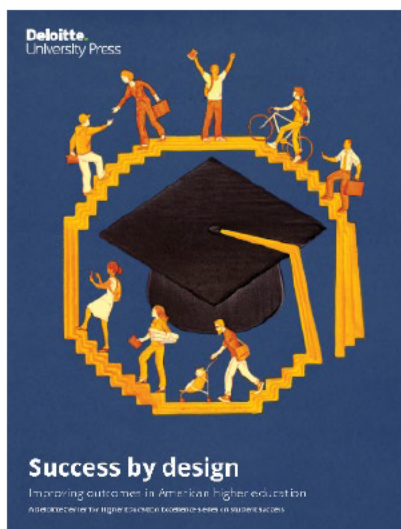
founded

and Center, community through forums and immersive lab sessions to increase collaboration and knowledge sharing in teaching, learning, and research.

Figure 30 – Representative Higher Education clients across the country

Additionally, to help colleges and universities contend with strategic and operational challenges, Deloitte the **Center for Higher Education Excellence**, which focuses on groundbreaking research to support institutions in navigating these issues reimagining their futures. Through the we engage the Higher Education

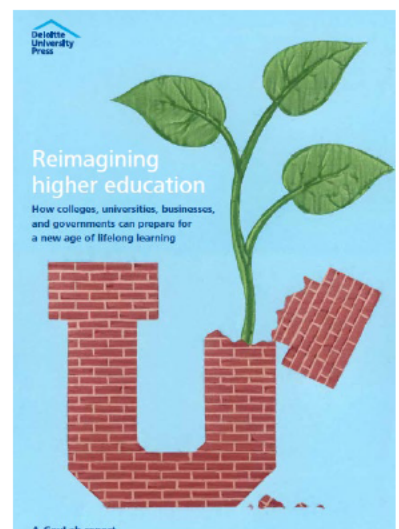
Some of the Center's recent research includes:



Colleges and universities face challenges to student persistence and completion, as well as changing demographic trends. However, by laying out a considered framework, institutions can design programs and services that promote student success.



How can U.S. state universities meet growing demands for relevance even as they face a funding squeeze? Here are five innovative ways that stakeholders can collaborate to deliver an effective yet affordable educational experience.



Fracture lines can be seen everywhere in America's Higher Education system. Colleges, universities, businesses, and governments can prepare for a new age of lifelong learning and make American Higher Education more accessible, affordable and relevant.



