**4.3 Technical Proposal**

**A. Proposal Cover Letter**

July 2, 2020

Worldgate, llc is an approved GSA vendor under *IT Schedule 70 #GS-35F-360AA, special item number 132.51,* and is pleased to submit this proposal in response to the New York City Department of Education (DOE) RFP # B4499 for GSA IT Consulting Services. We appreciate the opportunity to partner with DOE to provide highly qualified applicants for the positions listed below and to support the Division of Instruction and Information Technology’s mission of providing technology that enables equity and excellence.

Worldgate is an IT consulting and staffing firm focused on helping our school district clients achieve their strategic goals. As an ISO 9001:2015 Certified firm founded by executives from Fortune 50 IT organizations and top consulting firms, we have developed a proven and repeatable process to secure ensure the success of our clients. Worldgate is a Nationally Certified Woman Owned Business Enterprise headquartered in Reston, Virginia and with offices in Philadelphia, Atlanta and Houston.

Worldgate has extensive experience working with large school districts that mirror the scale and needs of New York, including nearby School District of Philadelphia (SDP) for the past 10 years. Worldgate was recently selected to provide SDP with ERP expertise and staffing support which has enabled SDP to dedicate the required resources to tackle complex challenges of a large cloud-based ERP implementation. This is just one example of the value Worldgate brings to a similar school district relationship.

Our list of highly qualified candidates proposed for each position are below:

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| Position Number | Candidate Name |
| 1. Project Manager- Application Modernization &  Enhancements | **Gary Cogan** |
| 8. Project Manager- IT Development & Management | **Alex Blackmore** |
| 16. Business Analyst- Application Modernization & Enhancements | **Hiba Almasri** |
| 24. Business Analyst - IT Development & Management | **Syed Nadeem** |
| 39. QA Analyst- Functional - IT Development & Management | **Charles Akinbowale** |
| 46. QA Analyst- Performance- Application Modernization & Enhancements | **Venkata Nallani** |
| 55. Application Developer/Architect - Application Modernization & Enhancements | **Dale Roth** |
| 149. System Architect - IT Development & Management | **Ben Benali** |
| 159. System Engineer- IT Development & Management | **Pierre Narcisse** |

The Proposer accepts all the terms and conditions listed in this Solicitation.

The Proposer meets all the requirements as specified in Section III.

We are enthusiastic about the prospect of working with DOE on all of your mission-critical technology initiatives and are confident in our team’s ability to deliver staff that executes above your expectations.

Thank you for your consideration.

Justin Zubrick

Justin Zubrick, Director of Client Services and Sales

*GSA IT Schedule 70 # GS-35F-360AA*

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**B. Proposal Content: Contractor’s Staffing, References and Qualifications**

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## **2. Organizational Profile**

Worldgate, llc., established in 2001, is a technology consulting and staffing firm based at 1760 Reston Parkway, Reston, Virginia 20190, with offices in Philadelphia, Atlanta and Houston. Our organization is in good financial standing, and has sufficient financial resources to meet payroll, equipment and supplies to meet operational requirements and ensure quality service.

Worldgate has served school districts and other public sector clients with technology consultation and staffing services for over ten years and has a proven track record of success. Our strong foundation is built upon our reputation in the industry as a trusted advisor, delivering services to support technology modernization efforts including supporting the design and implementation of modern ERP, SIS, CMS, LMS and data warehouse and business intelligence solutions. Worldgate specializes in serving medium to large school systems and our clients include The School District of Philadelphia, Atlanta Public Schools, Fulton County Schools, San Antonio Independent School District, Craven County Schools and Harnett County School District.

For over 10 years, Worldgate has focused on helping school district maximize the return on their technology investments. By leveraging our successful consulting, technology modernization, strategic advising and leadership development practices, our district clients have recognized greater operational effectiveness and efficiency. Worldgate clients most value our:

* *Industry focus*. We are focused on the supporting the needs of public education. Evidence of our focus includes: 1) a commitment to hiring employees with a passion for supporting K-12 education; 2) a structured training and support program for employees to help them survive and thrive in school district ecosystems; and 3) our satisfied and referenceable school district customers including the School District of Philadelphia, Baltimore City Schools, Atlanta Public Schools, Prince William County Schools, Arlington County Public Schools, Fulton County Public Schools and San Antonio Independent School District.
* *Employee focus.* We take pride in recruiting, hiring, developing and retaining people with a passion for public education. Due to our focus on recruiting and hiring highly qualified staff and supporting them, we retain over 80% of our employees annually.
* *ISO certified.* We are ISO 9001:2015 certified and among the first organizations to adopt the new 2015 Quality Standards. We are also recognized by BSI, our 3rd party certified as a quality leader. This means that we have developed successful, repeatable principles and processes that are 100% focused on delivery quality services to our public education partners.
* *Proven and Successful Talent Acquisition and Retention Approach*. Worldgate leverages our proven talent acquisition methodology which has led to efficient and rapid placement of business professionals who solve complex challenges for our clients. We understand our clients and are excellent at matching talent to their needs and culture.
* *Small, woman-owned certified.* As a small, nationally Certified Woman-Owned Business Enterprise we value diversity and pride ourselves on being agile, flexible, and responsive without the bureaucracy of a larger organization.

Worldgate has built a reputation in the industry as a trusted advisor. We support school districts in planning for, implementing and sustaining mission critical enterprise applications including Enterprise Resource Planning (ERP), Student Information Systems (SIS), Content Management Systems (CMS), Learning Management Systems (LMS), data warehouse and data visualization and analytic systems. In addition, we have expertise in implementing Kronos’s Workforce Ready Time and Labor solution for K-12 called “Time for School.”

The categories of technology consulting services and staffing support we have provided to school districts include:

* Project Management
* Change Management
* Organizational Leadership Development and Coaching
* Functional and Technical Development
* Cloud ERP Consulting
* Business Analysis
* Business Process Redesign
* Technical Writing
* Database Administration
* IT Help Desk
* Training
* RFP Development

**Worldgate’s Leadership Team**

With a team of over 40 full-time staff, Worldgate engages client leadership and program management with the goal of developing a holistic strategy that empowers technology to fulfill its role as an enabler of education success. The biographies identify key team member’s roles, responsibilities, education and qualifications. Each member of our team has played a role in the success of K-12 clients relevant to this RFP. More information about each team member can be found at <https://worldgatellc.com/meet-our-team/>.

**Katelyn Montgomery**

Katelyn Montgomery is the founder of Worldgate, LLC and is responsible for helping to define Worldgate’s vision, values, policies, and corporate strategy. In addition, Katelyn manages all internal operations including Human Resources, Finance, and our Quality Management System. Katelyn brings over 20 years of sales, marketing, and account management experience across both small and enterprise business in the IT, telecommunications, and non-profit sectors.

**Scott Montgomery**

Scott Montgomery is responsible for delighting our customers. He oversees the day to day operations of our Delivery, Consulting Services/Sales and the Recruiting operational teams. He leads the efforts of partnering with our clients and nurturing strategic alliances. Scott's leadership approach starts with employee well-being, growth and fostering a learner mindset. Scott learned his leadership skills as an executive leading a large team of client support professionals at Cisco and graduated George Mason University’s certification program as a certified leadership and organizational well-being coach and is pursuing [ICF](https://icfmetrodc.org/) ACC accreditation.

**Rob Moser**

As the Vice President of Public Sector Services, Rob Moser has responsibility for overseeing every service engagement to ensure success and high client satisfaction. Rob has over 20 of experience in operational management, strategy development, coaching, and organizational change management. He has led large school district and state education agency projects for IBM, Amplify (Wireless Generation). He currently manages a team supporting the implementation of enterprise applications for our strategic school district client accounts.

**Richard Yannelli**

As the Program and Client Engagement Manager for Worldgate, Richard leverages his 35 years of K-12 industry experience leading academic and operational software systems development and implementation teams to manage, evaluate and support Worldgate’s services staff working with our K-12 clients. He acts as a liaison to our client hiring managers aligning their needs the needs of the project with staff skills and expertise. In collaboration with the school district hiring managers, he evaluates Worldgate staff and works to ensure their success through continuous professional development, communication and recognition to create a positive work environment that ensures high productivity and employee retention.

**Justin Zubrick**

Justin Zubrick is the Director of Client Services and Sales and has been with Worldgate since 2010 serving as the engagement manager for our most strategic clients. He leads our recruiting services to ensure we deliver the right people to solve our client’s most demanding challenges. Justin has built Worldgate’s Talent Acquisition practice and is skilled at understanding our client’s needs and working closely with them to design effective staffing solutions.

**Tinsley Stricker**

Tinsley leads the Human Resources department and the ISO certified Quality Management System. Tinsley works closely with our clients to align our HR practice with client requirements and processes. Tinsley ensures our employees feel valued and develops creative employee recognition and retention approaches. Tinsley ensures Worldgate adheres to all hiring laws and practices and she has implemented Worldgate’s HR system.

**Dannielle LaRosa**

As Chief Financial Officer, Dannielle leads Worldgate’s Accounting and Finance division. Dannielle brings over 20 years of experience in finance, treasury and accounting at both public and private companies. Dannielle has a proven track record of collaborating with our clients to ensure billing requirements are met.

The following Organizational Chart and summary report reflects Worldgate’s approach to ensure quality work, meeting required schedules and deadlines, and working within an agreed upon budget.

For more than 10 years, Worldgate has been providing high quality technology consulting and staffing services to school district clients. The table below highlights our experience and the longevity of our client relationships, including many school districts with more than 10,000 employees. We are happy to highlight projects we have supported within the last three years for School District of Philadelphia, Fulton County Public Schools and Prince William County Schools.

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| Atlanta Public Schools, GA | 2013 to Present |
| Arlington County Public Schools, VA | 2012 to Present |
| Baltimore City Schools, MD | 2019  |
| Bibb County Schools, GA | 2012 to 2014 |
| Craven County Schools, NC | 2019 to Present |
| DeKalb County School District, GA | 2016 to 2017 |
| Federal Department of Education | 2014 to 2018 |
| Fulton County Public Schools, GA | 2018 to Present |
| Harnett County Schools, NC | 2019 to Present |
| The School District of Philadelphia, PA | 2009 to Present |
| Prince William County Schools, MD | 2011 to Present |
| San Antonio ISD, TX | 2019 to Present |

Worldgate is happy to share the following success stories for staffing projects with the School District of Philadelphia, Fulton County Public Schools, and Prince William Public Schools. The narratives of each project demonstrate the value Worldgate brings to large school district partners, all within the last 2 years.

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| **School District of Philadelphia, PA** |
| Description of Project | Since 2009, the School District of Philadelphia (SDP) has recognized Worldgate as a strategic partner and our employees have worked as dedicated and valued members of the SDP community. By performing a wide range of professional services across the organization in support of various IT modernization initiatives including the implementation of their modern Oracle Cloud-based ERP system in collaboration with CherryRoad. We are also currently leading the implementation of their Kronos Workforce Ready “Time for School” solution. Worldgate provide services to support in the modernization of their enterprise systems, such as: Student Information System (Infinite Campus), Data Warehouse, Analytics and Business Intelligence tools, Content Management System, Google Apps for Education, Identity Management, Help Desk System, Facilities Management System and Transportation System. Worldgate has earned the trust of the district’s CIO and leadership team as we continue to partner to modernize their IT and business systems.Currently, Worldgate has around 30 employees providing services to the School District of Philadelphia. Of those, 3 are supporting the district’s Oracle ERP project (Oracle Cloud Functional Lead, Project Analyst, ERP HR Analyst) and 3 are supporting the implementation of the Kronos Workforce Ready solution in the cloud, (Change Manager, Functional Lead, Trainer.) All of our employees supporting this mission-critical ERP project possess the credentials and professional certifications necessary for this project and as required by the school district.In 2018, Worldgate was awarded the contract for ERP Staffing to support the district in staffing for positions within, HR, Finance and IT to augment these teams as they implemented Oracle’s new Cloud-based ERP system working alongside Oracle’s systems integrator, CherryRoad.Specific to the ERP project, Worldgate is currently providing an Oracle ERP Cloud functional expert to perform project management, business process requirements gathering, architecture, vendor deliverable management, system configuration, and report design as part of the district’s team. Worldgate is currently partnered with Kronos to implement SDP’s Kronos Workforce Ready solution, providing Change Management, Project Management, Functional Consulting and Training. Worldgate’s Kronos team is working in collaboration with the ERP System Integrator, CherryRoad, to ensure effective integration of the Kronos time and labor system with their Financial and Payroll systems.  |

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| **Fulton County Public Schools, GA** |
| Description of Project | Worldgate currently partners with Fulton County Schools (FCS) and is currently contracted on their IT Consulting Services contract. Worldgate has provided IT business analysis and business intelligence consulting services. Worldgate’s business analysis services supported the ‘Atlas’ project, which was a 2-year documentation and review of all ERP business processes and desired future state. Worldgate’s ERP Analyst consultant worked with the FCS Atlas team to document current ‘as is’ state of functional ERP business processes and facilitated the sessions of redesign for the ‘future state’ business processes.Currently, Worldgate is providing Business Intelligence consulting services to support FCS’s new SIS (Infinite Campus), SIS data integration and are developing new dashboards and reports using the Microsoft BI stack with the goal to drive data driven decision making at Fulton County Schools. All of our employees supporting these mission-critical projects possess the K-12 education credentials and professional certifications necessary for this project and as required by the school district.Through our work at FCS and other K-12 districts in the GA/Atlanta area, we have a keen understanding of K-12 State of GA reporting requirements and have solid understanding of the GA consultant community and culture to help support any need for a major K-12 enterprise project.  |

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| **Prince William County Schools, VA** |
| Description of Project |  Prince William County Schools (PWCS) has been in partnership with Worldgate since 2011. Worldgate customized and implemented a data warehouse and reporting tool called, DataBlocs K12 Analytics, for PWCS that is still in use today. PWCS serves over 82,000 students as the second largest school district in Virginia. Through Worldgate’s partnership the K12 Analytic System has helped transform the learning partnership between leadership, administrators, teachers and students. This system now provides the required data visibility for teachers, principals, administrators, and the superintendent allowing for data driven decision making. Worldgate currently provides consulting services to support PWCS’s enhancement of their Business Intelligence and Data Warehouse system. Working to enhance the dashboards and reports while developing standardized reporting processes to enable teachers, principals, school administration and leadership to make data driven decisions. Worldgate’s BI Consultant works to develop new BI dashboards and define future state reporting processes and data flows. Worldgate documented a data dictionary, development processes and a business user guide for all new BI deliverables.  |

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## **3. Staff Requirements**