



RICHARDSON INDEPENDENT SCHOOL DISTRICT
RFP # 1567- Miscellaneous Consultant Services

Due Date: May 29, 2020



Prepared By:

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Worldgate, llc is pleased to submit this proposal in response to Richardson Independent School District (RISD) RFP # 1567 for Miscellaneous Consultants. We appreciate the opportunity to partner with RISD to provide highly qualified expert consultants to meet the unique technology needs of your district. From project managers, application developers, technical writers and more, we are confident in our ability to provide RISD with high quality, professional personnel that you will need to attain the highest long-term value for the years to come.

Leveraging lessons learned from work over the past ten years with school districts across the country, we believe Worldgate is uniquely positioned to fulfill the requirements of this RFP. Worldgate is a Nationally and Texas-Certified Woman Owned Business Enterprise. While headquartered in Reston, Virginia, we maintain offices in Philadelphia, Atlanta and Houston. 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 ensure the success of our clients. By leveraging our cost-effective and successful technology modernization, strategic advising and leadership development practices, our school district clients can focus on providing equitable teaching and learning opportunities for their students, staff and community while being fiscally responsible.

Worldgate acknowledges that finger printing may be required of all contractors and will comply with all requests as stated in the RFP.

We are currently providing San Antonio ISD with an experienced, on-site Project Manager to support their implementation of modern ERP (Enterprise Resource Planning) and SIS (Student Information System) and were recently selected by North East ISD as an approved technology consulting and staffing provider. We look forward to the opportunity to engage with more districts across Texas.

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

Thank you for your consideration.

Diana Richie

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Qualification of Firm

Worldgate, llc (www.worldgatellc.com) is an ISO 9001:2015 certified, technology management and systems integration consulting firm based in Reston, Virginia with offices in Philadelphia, Atlanta and Houston. We offer superior, value-priced services and reliable delivery for our school district clients. As a National and Texas Women’s Business Enterprise, Worldgate values diversity and is an equal opportunity employer.

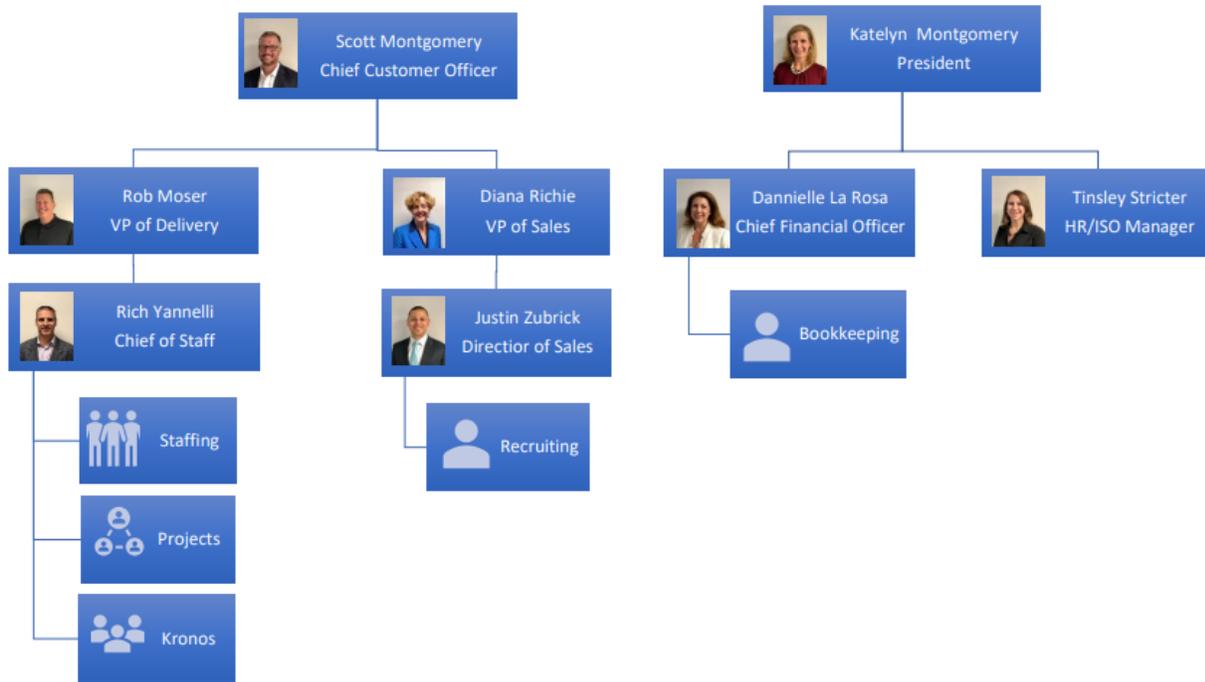


With over 10 years of experience providing medium to large school systems with technology consulting, staffing and managed services, Worldgate has built a reputation in the industry as a trusted advisor. We support districts in planning for, implementing and sustaining mission critical enterprise applications 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.”

Our happy K-12 clients include The School District of Philadelphia, Baltimore City Schools, Atlanta Public Schools, Prince William County Schools, Fulton County Public Schools, Arlington County Public Schools, DeKalb County School District, and the Federal Department of Education.

Worldgate's Leadership & Client Engagement Team

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 chart below displays the structure of our leadership, and following biographies highlight the qualifications and experience of our staff.



Katelyn Montgomery

Katelyn Montgomery is the founder of Worldgate, LLC and helps to define Worldgate's vision, values, policies, and corporate strategy. In addition, Katelyn is responsible for 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 teams. He leads efforts to collaborate with our clients and partners. Scott's leadership approach starts with employee well-being, growth and fostering a learner mindset. Scott gained his leadership skills and experience at Cisco leading a large team of client support professionals. He is a graduate of George Mason University's certification program as a leadership and organizational well-being coach, and is currently pursuing [ICF](#) ACC accreditation.



Rob Moser

As the Vice President of Public Sector Professional 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) and as an independent consultant. 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.



Diana Richie

As the Vice President of Sales, Diana is responsible for leading and developing our sales and marketing team to ensure we add value as a trusted advisor and thought partner to education clients. Diana began her career as a middle school and high school English teacher, and has made creating equitable learning opportunities through the effective use of instructional and operational technology her life's work. She advocated for educators and district leaders in her leadership roles at Compaq, Hewlett-Packard and Oracle Corporation and at the non-profit, New Teacher Center.



Justin Zubrick

Justin Zubrick is the Director of Sales and Recruiting and has been with Worldgate since 2010. 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 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 record of accomplishment of collaborating with our clients to ensure billing requirements are met.

Industry Knowledge and Expertise

For over 10 years, Worldgate has focused on helping school district maximize the return on their technology investments. By leveraging our successful ERP 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 and Fulton County Public Schools.
- *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 certifier as a quality leader. This means that we have developed successful, repeatable principles and processes that are 100% focused on delivering 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. Worldgate understands our clients and we are excellent at matching talent to their needs and culture.
- *Small, woman-owned certified.* As a small, Nationally and Texas 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’s Talent Acquisition and Retention Methodology

Worldgate approaches each staffing opportunity with our Talent Acquisition Methodology and ensures that our experienced talent acquisition staff work within our methodology. This has led to efficient and rapid placement of technology and business office professionals for our school district client organizations. Below is a high-level overview of Worldgate’s 3-stage recruitment strategy model:

Worldgate Talent Acquisition Methodology



Identify

Worldgate embraces each opportunity and the identification process as critical to ensure staffing success. Our company will assign a Client Engagement Manager for the duration of this contract who will be a direct point of communication. The Client Engagement Manager will take the initiative to meet and learn more about the culture, mission, priorities and organizational structure of RISD. This approach has led to efficient and rapid placement of IT and business professionals in many of our client organizations.

Upon receiving an initial staffing opportunity, your Client Engagement Manager will work with you to complete a requirements analysis. Worldgate not only identifies the position requirements but will ensure that the work environment, technologies, corporate culture, and other intangibles are communicated to our recruiters through the Client Engagement Manager. Once we have received a task



order, our team meets to discuss the particular requirements and to determine what additional information is necessary to qualify and present candidates.

Identifying the position parameters and organization culture allow us to leverage a particular sourcing pillar for candidate discovery. Worldgate pillars of sourcing include our current consultant base, recruitment systems, professional organizations, community and ecosystem, our applicant tracking systems containing passive and active candidates, and a comprehensive social media campaign when necessary. Using our applicant tracking system, we review our pool of available candidates to determine which of them is the best technical and cultural fit for your organization.

Evaluate

Worldgate's staff evaluates candidates in a tiered approach depending on the task order and requirements. The first tier includes an initial phone screen, which we use to match location, availability, experience, skillsets, attributes, career goals, soft skills and salary expectations. Our goal is to work as hard and as fast as possible to find the most qualified candidates that qualify for the interview stage.

Tier two requires an interview with the Client Engagement Manager, which allows us another layer of screening with someone who understands your environment and exactly what you are looking for. As needed, a professional skills and technical assessment will be administered depending on the job requirements.

Propose

After our candidate evaluation is completed, Worldgate's Client Engagement Manager will propose a candidate profile and resume for review in a timely manner in accordance with the task order. We then follow up to determine whether the candidate has been selected for interview. If an interview has been approved, Worldgate will coordinate logistics to accelerate the interview process. Reference and background checks are completed for those candidates that RISD wishes to interview.

Once the interview is set, we meet with the candidate to discuss the interview process and share more about the client. It is important for the candidate to be excited about the job and want to work with RISD for the duration agreed upon. We make sure that the candidate has all pertinent information as to location, date and time. After the interview, the Client Engagement Manager will schedule a post-interview meeting with the candidate to gain critical feedback.

The ultimate goal of Worldgate's implemented Talent Acquisition Methodology is to acquire the right candidate to match the specific hiring manager requirement. Our process is easily repeatable and can be customized to fit the requirements of each client as necessary.

Retention Strategy

Worldgate commits itself to the ongoing growth and development of all employees. Each employee is a valued resource and Worldgate employs a retention strategy to retain our talented team members and support them in growing professionally. Worldgate's established policy and procedures can efficiently assess and train employees as part of a contract requirement, advancement of employee knowledge base or skillset, or for any unplanned knowledge gaps exist. Our culture encourages our staff and project managers to coach, mentor and share knowledge with fellow employees. Featured below is Worldgate's step-by-step retention strategy shown as a repeatable model that is specific to the employee and company retention goals:

Worldgate Retention Model



Identify: Worldgate first identifies skillsets which match the current and future goals of the company and at the same time identifies what skillsets are needed for current and targeted projects. Worldgate then identifies those skillsets within our employee base and identify specific employee skillsets to better understand where our capabilities reach.

Assess: Worldgate assesses where knowledge or skill gaps lie in our employee base. It is important to assess quickly if an employee knowledge gap must be filled immediately or if that gap can be targeted over time.

Personalize Strategy: After a gap assessment, identified needs emerge specific to each employee. Understanding that each individual learns differently, Worldgate makes effort to personalize and tailor professional development for each employee.

Develop: Worldgate develops an individual development and retention program for each employee. Each plan will determine training programs, continuing education, coaching and other tools which are deemed appropriate in the advancement of that employee.

Delivery: Once an employee has closed any knowledge or skill gaps relevant to the needs of a client, Worldgate is able to deliver a resource who meets project requirements and is aligned with organizational goals.

Throughout this process, a trusted relationship is forged among Worldgate, our employee and our client and recognizes the need for continuous collaboration and improvement.

Past Performance in K-12 Education

The following school district client case studies are intended to provide RISD with specific examples of our experience and capabilities.

Philadelphia School District, PA

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 modernizing their ERP System, Student Information System, Data Warehouse, Analytics and Business Intelligence tools, Content Management System, Google Apps for Education, Identity Management, Facilities Management System and Transportation System, Worldgate has earned the trust of the district's CIO and leadership team.

The categories of technology consulting services and staffing support we have provided to the School District of Philadelphia include:

- Project Management
- Change Management
- Organizational Leadership Development and Coaching
- Functional and Technical Development
- Oracle Cloud ERP Consulting
- Kronos Workforce Ready Consulting
- Business Analyst
- Business Process Redesign
- Technical Writing
- Database Administration
- IT Help Desk
- Training
- RFP Development

Key Projects

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.

Worldgate is currently supporting SDP's Kronos Workforce Ready implementation as a part of the SDP team, 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.

Worldgate is providing an Oracle ERP Cloud functional consultant to perform project management, business process requirements gathering, architecture, vendor deliverable management, system workflow design, and module configuration as part of the district's team.

Worldgate began its relationship with SDP by leading the implementation of its Data Warehouse and BI/ Analytics solution. Throughout the years, we have also provided Systems Integration Services, IT Staffing, Student Information System and Content Management System consultation, Help Desk Support, Training, RFP Development and Organizational Leadership Development

Atlanta Public Schools, GA

With a \$1B annual budget, Atlanta Public Schools (APS) educates 50,000 students at 98 learning sites and employs a staff of 6,300. Worldgate has partnered with APS since 2013 and have provide services on various key projects.

The categories of services and staffing support we have provided to Atlanta Public Schools on key projects include:

- Project Management
- Business Analyst
- Business Process Redesign
- Kronos Workforce Ready Consulting
- Infor/Lawson ERP Consulting
- Data Warehouse Consulting
- Business Intelligence Consulting

Key Projects:

Worldgate has provided Kronos time and labor consulting services to support APS in the upgrade and migration of their Kronos system to the Kronos Cloud. Worldgate worked with APS to document current to future state functional business processes, redesigned business processes, and built workflows for configurations. Worldgate worked to map processes and workflows from the Kronos Time and Attendance system to the Lawson ERP system and designed new integration processes during the on-going Lawson ERP system upgrade.

Atlanta Public Schools engaged Worldgate to support their PMO Office and provide consulting services in the areas of project management and business analysis supporting a Maximo IT service management implementation project and Infor/Lawson ERP upgrade project.

Recently, Atlanta Public Schools contracted with Worldgate to provide ETL development and BI development services to support the maintenance and upgrade of their Human Resources/Talent Data Warehouse and Analytics system. The goal of this current project is to allow them to more accurately and transparently report and make decisions based on their human resources data as it relates to teacher and principal recruitment, development, retention and effectiveness.

Arlington Public Schools, VA

Arlington Public Schools is the 13th largest district in Virginia serving and are the recipient of the prestigious Medallion of Excellence Award present by the U.S. Senate Productivity and Quality Awards for Virginia and the District of Columbia. Worldgate has worked with Arlington Public Schools since 2013 and have supported them on many important projects.

The categories of services and staffing support we have provided to Arlington Public Schools include:

- Business Process Redesign
- Oracle ERP Consulting
- Business Intelligence & Data Warehouse

Key Projects:

Worldgate implemented a data warehouse and reporting solution called, DataBlocs K12 Analytics. Worldgate worked to integrate many existing incongruent enterprise systems into an enterprise data warehouse. Worldgate implemented DataBlocs K12 Analytics as the Data Warehouse System paired with a MicroStrategy BI tool that currently supports the required data visibility for teachers, principals, administrative staff that enables data driven decision making across the district. We provided Arlington Public Schools with K-12 reports and dashboards along with industry standard key performance indicators (KPIs) to support district stakeholders. Our solution currently is empowering stakeholders at all levels to access and perform analysis on their data accurately and easily.

Additionally, Worldgate worked with Arlington Public Schools in support of their Oracle ERP system upgrade as they transitioned to the Oracle Cloud.