



NORTH EAST INDEPENDENT SCHOOL DISTRICT

RFP # 06-20: Software, Product Support, Annual Renewal of
Software Licenses, and Software Consultants III

July 29, 2019



Prepared By:

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North East Independent School District
8961 Tesoro Drive, Suite 317
San Antonio, Texas 78217

July 29, 2019

Worldgate, llc is pleased to submit this proposal in response to North East Independent School District (NEISD) RFP # 06-20 for Software, Product Support, Annual Renewal of Software Licenses, and Software Consultants III. We relish the opportunity to provide NEISD with 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 NEISD with high quality, professional personnel that you will need to attain the highest long-term value for the years to come. As a highly experienced firm specializing in helping school districts and public sector organizations maximize their technology investments, Worldgate is uniquely positioned to fulfill the requirements of this RFP.

Worldgate is a woman-owned business enterprise and nationally certified by the Women's Business Enterprise National Council, as well as, Women's Business Council- Southwest incorporating San Antonio. While headquartered in Reston, Virginia, we maintain offices in Philadelphia, Atlanta and Houston. In addition, we are an ISO Certified firm founded by executives from Fortune 50 IT organizations and top consulting firms. We have a passion for accelerating the effectiveness of school districts by helping them maximize the return on their technology investments. Leveraging our successful technology modernization, strategic advising and leadership development practices, school districts and public sector organizations can focus on providing equitable learning, teaching and living opportunities for their students, staff and community.

Worldgate acknowledges that finger printing may be required of contractors, and will comply with all requests as stated in Section II. We look forward to the opportunity to work with NEISD on this initiative and are confident in our team's ability to deliver above your expectations.

Thank you for your consideration.

Diana Richie

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Executive Summary

Since 2002 Worldgate has successfully provided technology consulting, managed services and staff augmentation services to school districts and public sector clients across the country. Our highly satisfied clients include The School District of Philadelphia, Atlanta Public Schools, Prince William County Schools, Arlington Public Schools, and Fulton County Public Schools.

Worldgate is an ideal partner to provide as needed professional information technology services outlined in the RFP for the following reasons:

- *We are industry focused.* We are focused on the supporting the needs of school systems and state and local government agencies. Evidence of our focus includes: 1) a commitment to hiring employees with a passion for supporting K-12 or public sector organizations; 2) a structured training and support program for employees to help them survive and thrive in these environments; and 3) our satisfied and referenceable clients.
- *We are employee focused.* We take pride in recruiting, hiring, developing and retaining people with a passion for supporting school districts or public sector. We retain 80% of our high-quality staff and many of those we do not retain go to work for our clients.
- *We are easy to do business with.* We make it easy to do business with us through a variety of national, state and local procurement vehicles.
- *We are ISO certified.* We were one of the first organizations to adopt the new 2015 Quality Standards and achieve ISO 9001:2015 certified. 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 K-12 and public sector partners.
- *We are a small, woman-owned certified business.* As a small, woman-owned business we value diversity and pride ourselves on being agile, flexible, and responsive without the bureaucracy of a larger organization.

We work to help our clients maximize their technology investments through a combination of our aggressive staffing approaches, expert consultants, proven methodologies, strategic partners, and portfolio of service offerings. From planning to implementation and beyond, Worldgate delivers with a high degree of consistency and a focus on customer satisfaction. While we provide technology consulting services across many areas, our specialties include: 1) Enterprise applications readiness consultation; 2) Technology modernization project management and change management support; and 3) strategic staff augmentation.

Worldgate relishes the opportunity to support NEISD with the following comprehensive services:



Strategic Planning



Project Management



Change Management



Business Process Redesign



Training and Documentation



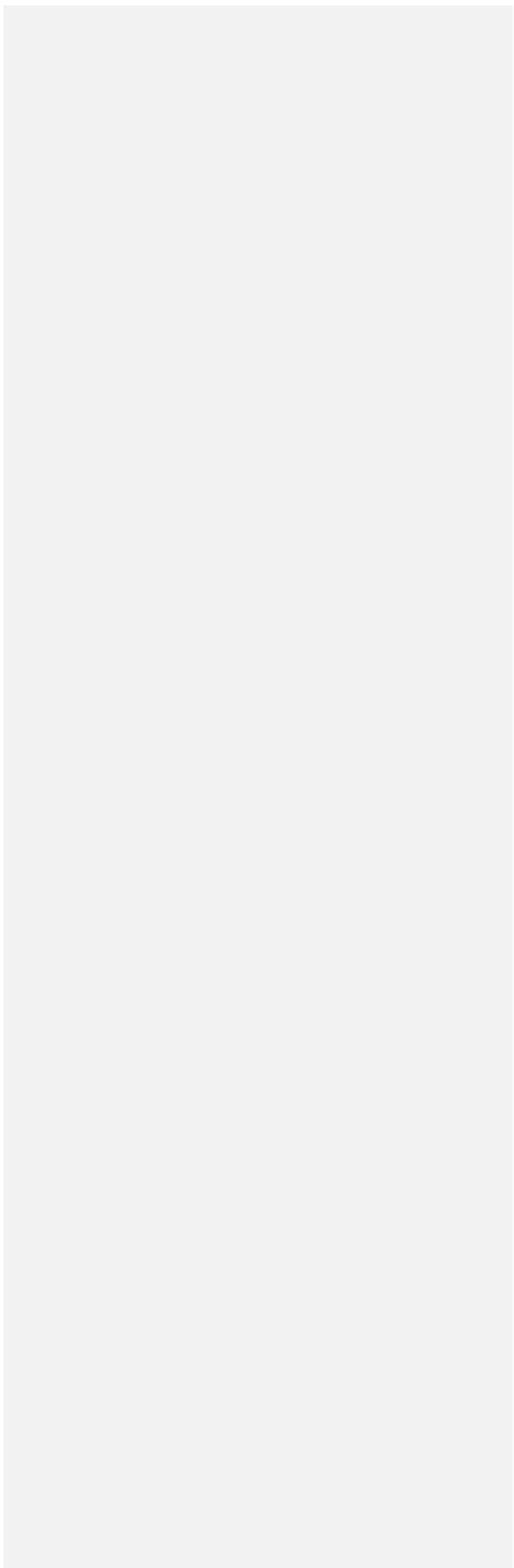
Release Management and Testing



Help Desk and Managed Services



Staff Augmentation



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 Women's Business Enterprise](#), Worldgate promotes diversity and is an equal opportunity employer. As exemplified by the certificates provided, Worldgate is also a Texas (South and North) Certified Woman Owned Business.



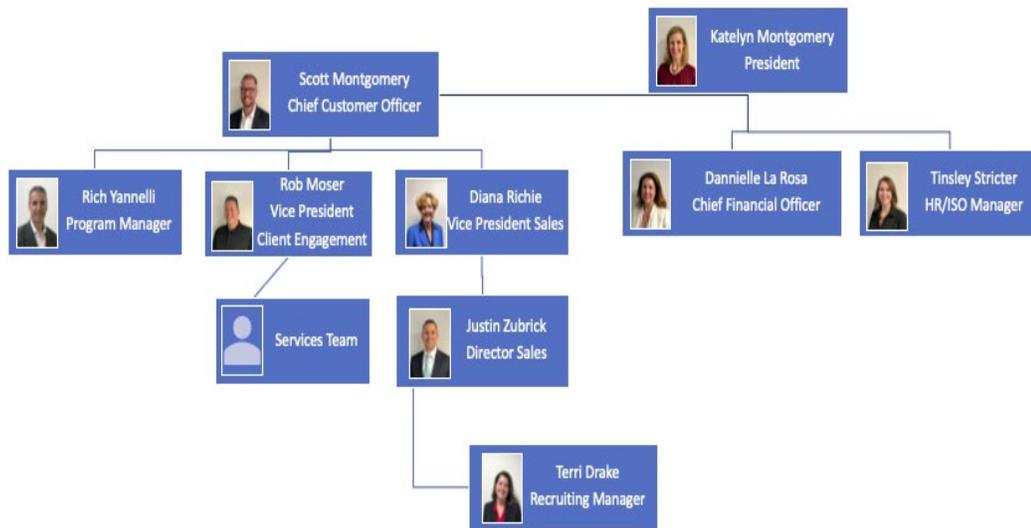
Worldgate has served school district and other public sector clients with technology consultation and staffing services for over 10 years and has a proven track record of success. Our strong foundation is built upon a reputation in the industry as a trusted advisor, delivering services to support technology 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 large school systems and our clients include The School District of Philadelphia, Atlanta Public Schools, DeKalb County School District, Prince William County Schools, Fulton County Public Schools, Arlington County Public Schools, and AIR (American Institutes for Research)/ ED.

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 business success. The leadership structure of our firm highlighted in the follow chart and biographies showcase the qualifications of our staff and our experience.



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 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 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](#) ACC accreditation.



Rob Moser

As the Service Delivery Executive for all our project engagement work, Rob Moser has responsibility for overseeing every engagement to ensure success and high client satisfaction. Rob has over 20 of experience designing and implementing data warehouse and business intelligence solutions for large school systems and state education agencies and currently manages a team supporting the implementation of enterprise applications in our strategic client accounts.



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 and state and local leaders. 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 Hewlett-Packard and Oracle Corporation and at the non-profit, New Teacher Center.



Justin Zubrick

Justin Zubrick is the Director of Client Services and has been with Worldgate since 2010 serving as the engagement manager for our most strategic clients.. He leads our client engagement and 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.



Terri Drake

Terri is the Recruiting Manager for Worldgate, llc. She is responsible for leading all aspects of the Recruiting department: full life cycle recruiting, evaluating tools and processes, and building strong candidate/customer relationships. Terri brings over 6 years of recruiting experience.



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.



Danielle LaRosa

As Chief Financial Officer, Danielle leads Worldgate's Accounting and Finance division. Danielle brings over 20 years of experience in finance, treasury and accounting at both public and private companies. Danielle has a proven track record 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 attributes most valued by school districts vary depending on their needs, however, the qualifications they value most include:

- *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, Atlanta Public 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 Certified Woman-Owned Business Enterprise focused on supporting public education we pride ourselves on being agile, flexible, and responsive without the bureaucracy of a larger organization.

