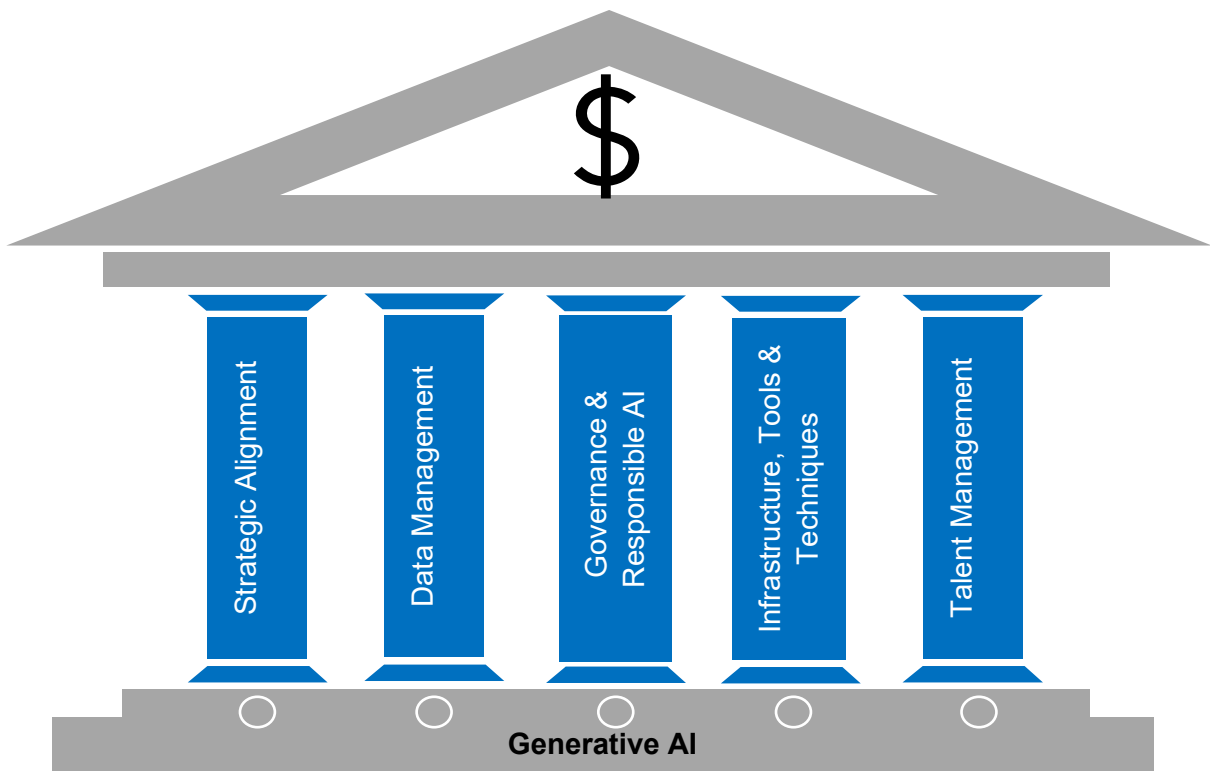




ARTIFICIAL INTELLIGENCE (AI) CONSULTANCY SERVICES

RFP # 2025-023



JANUARY 17, 2025

THE FULCRUM GROUP INC.
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REQUIRED RESPONSE INFORMATION

Certificate of Offeror

Separate PDF #1.

Statement of Understanding

Our understanding of this RFP results in these points of observation.

- The NCTCOG program wants to identify possible AI options and AI vendors to assist members on their AI journey.
- AI is a wide-ranging and brand-new technology requiring new skills for developing and specialized adoption skills for organizations desiring.
- Organizations have some pre-existing Use Cases in mind, and there may already be packaged products specifically for some of those use cases.
- There will be multiple awards so clients can match with desired experts.
- This RFP is the beginning of a qualification process for potential vendors.
- Vendors should provide evidence for bona fide experience in AI.
- Local government and constituent organizations already have legacy technology that AI would need to connect to or interact with to be successful.
- Local government needs can be highly specialized with the breadth and variety of systems ranging from traditional technology to SCADA systems, requiring CJIS compliance for public safety or IOT connectivity for public works.

They sampled some specific use cases to assist vendors self-identify their ability to assist.

Key Objectives

- Operational Efficiency: Enhance workflows, automate tasks, and optimize resource management.
- Service Delivery: Improve responsiveness, citizen engagement, and decision-making processes.
- Innovation: Foster the adoption of advanced AI technologies for diverse government functions.

Scope Development

- Address specific departmental needs (e.g., administration, finance, IT, public safety, public works).
- Integrate seamlessly with existing systems and ensure data security and compliance.
- Provide ongoing support, maintenance, and training for staff.

Key Challenges

- Diverse Needs: Public sector entities have needs like utility billing to public works, which can benefit from AI solutions. But there needs to be vastly different from public safety or water district needs.
- Data Integration: AI systems must integrate with legacy systems.
- Scalability: Solutions must support a wide range of data volumes and usage patterns, scaling effectively for both small municipalities and larger cities and towns.

- Data Privacy and Compliance: Ensuring compliance with stringent data security laws and standards (e.g., PCI, HIPAA, FERPA, FOIA, CJIS) is critical.
- Limited Technical Expertise: Government staff may lack the experience or time to completely envision and implement AI systems, necessitating user-friendly design, development and training.

Opportunities

- Efficiency Gains: Automation of manual tasks or integrating between different systems can help abate current staffing challenges.
- Enhanced Citizen Engagement: AI-driven chatbots and recommendation systems provide instant responses to citizen inquiries.
- Predictive Analytics: Insights from AI can improve financial planning, infrastructure maintenance and public safety measures.
- Cost Savings: Shared services under the TXShare program allow smaller entities to access advanced technologies at reduced costs.
- Improved Decision-Making: Real-time analytics and AI-powered dashboards empower leaders to make informed decisions.

References

List of four (4) recent references

Since Ingram Micro is a partner to organizations like me, they do not sell direct. They go market via firms like Fulcrum Group to complement our internal services. Their services division is focused on advanced technologies and higher-level Subject Matter Experts that are more affordable as a pooled bucket of resources than a standalone team. Thus, Ingram cannot provide client references as the client reference belongs to the service providers.

However, since the Fulcrum Group provides managed services in the IT networking and cybersecurity space, we have listed four individuals we have worked with in local government in their current or a prior role. We are providing these references to share our understanding and current involvement in the local government space.

Contact information for each reference

Drew Corn, Town Manager

DCorn@town.northlake.tx.us

(940) 242-5701 x211



Ben White, City Manager/Public Works Director

B.White@farmersvilletx.com

(972) 782-6151



Sean Smith, Director of Finance

ssmith@townofpantego.com

(817) 617-3700



Erika McComis, Director of Finance

emccomis@richlandhills.com

(940) 389-4388



PROJECT RELATED EXPERIENCE AND QUALIFICATIONS

Ingram Micro has quite a few pre-existing AI projects that have been scoped out with Statements of Work developed. But, they do match the specifics of the RFP. Additionally, due to the nature of AI, there still needs to be discovery to right size it for the specific needs, applications and size of an organization. We've included a few samples below, but many more have been established.



Additionally, Ingram Micro AI development structure helps the organization custom develop solutions for unique use cases, such as the ones listed in the RFP. These and generative AI custom use cases are appropriate at the enterprise level, as well as standalone offerings.

For these there are key considerations for pricing that include the specific delivery method organizational size, maturity level, number of use cases, UC requirements, flexibility and IT landscape. There are additional pricing options for time and material projects, with the

organization does not have a good scope or does not quite understand everything yet related to their use case project.

Business and Technology Workshops

At engagement, Ingram consultants will work with clients to unravel more details to help create the most accurate scope, to help develop a sharper price with more clarity via our Business or Technology Workshops. Following is a simplified visual of how workshops are structured.

AI Discovery Methods: Business Workshop

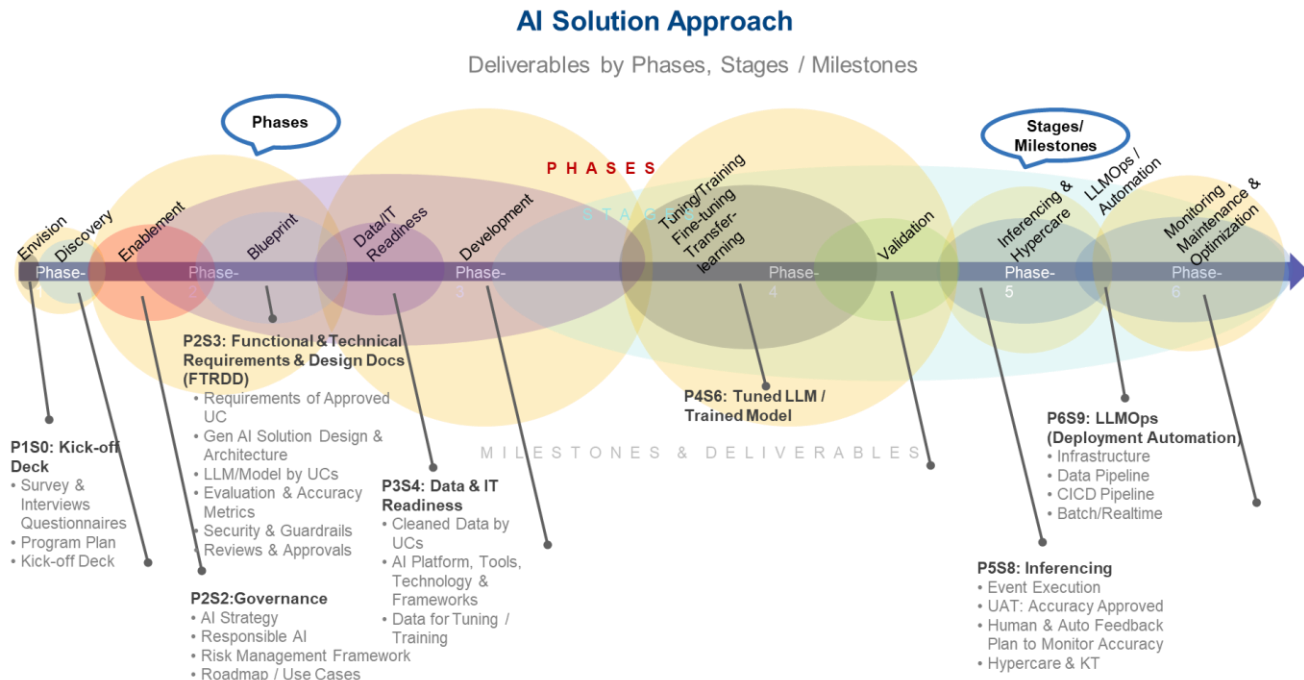
Documents & Processes	Data Sources & Quality	Business Context
Discovery		
<ul style="list-style-type: none"> Survey & Interviews Current Business Strategy Business Organization Chart Processes & Documents by Domain Current Issues, Challenges & Risks Top Priorities by Domain Current Governance Model List of potential AI use cases by priority <p>(availability may vary)</p>	<ul style="list-style-type: none"> Important Data Sources by Domain Concerns about making data-driven decision making Important IT systems being used by Business by Domain Data Rules, Processes and Policies Important Data Roles (Business Data Owner, Data Steward etc.) 	<ul style="list-style-type: none"> Understand business by domain Domains need immediate attention Business Impact and Function Strategic Initiatives Constraints: Business and Technical Operational Readiness Future State Requirements Wishlist Potential List of AI use cases, if any Areas of Concerns
Use Cases, Data Analysis, Domain Requirements		

AI Discovery Methods: Technical Workshop

Documents & Processes	Infrastructure, Tools & Techniques	Data Sources & Quality
Discovery		
<ul style="list-style-type: none"> Survey & Interviews Current IT Strategy IT Land Scape Diagram IT Organization Chart IT Documents & Processes by Domain Security Policies Monitoring Processes Existing AI Application Documentation <p>(availability may vary)</p>	<ul style="list-style-type: none"> IT Landscape Diagram Data Platform & Pipelines Cloud: On-premise, Azure/GCP/AWS or Multi-cloud API Management Architecture Diagram AI Architecture, Tools & Techniques DevOps/LLMOps Architecture & Docs AI Enablement Maturity Level 	<ul style="list-style-type: none"> Mapping of current AI applications with corresponding data Data Landscape Diagram Data Consolidation Platform (MDM) Docs Data Maturity Level Data Rules, Regulations, Policies etc. Data Sources by Domains Data Integration
Documentation, IT Land Scape & Data		

Sample Project Planning Elements

Below, see a visual flow of project planning for a project like the AI-7 Proof of Concept/ Pilot / End to End software solution development, as an example of our project lifecycle and AI expertise.



Experience and Qualifications

Due to Ingram's size and number of personnel, it is hard to isolate all potential people that could be on a project. We are listing 3 people below, including one from Fulcrum that would be involved to share

Resumes and qualifications of key personnel

Fulcrum- Primary Point Of Contact *Initials- SM*

CISSP, CCNA, CCDA, MCSE, Microsoft 365 Certified Security Administrator, CompTIA Project+

SM is a 30-year IT veteran with comprehensive experience dealing with local governments, school districts, corporations, nonprofits and small businesses. His insight into local government includes many of the applications his organization co-supports today with their managed services clients. His understanding of generative AI, data workflows, integrations, project management, State of Texas specific information and compliances, such as HIPAA, PCI and CJIS will assist with project development.

- ◆ Projects and Experiences: Developed cyber security review and presentation for executive level officers of current clients to evaluate systems and explain risk management. Conducted network and security assessments for two different billion-dollar organizations. Currently provide full managed services support for non-profits such as Casa Manana and Fort Worth Chamber. Implemented site wide deployment of Cisco network infrastructure, wireless, VMware servers,

Storage Area Network, and security for the Fort Worth Zoo. Conducted HIPAA Risk Assessment for Lifenet EMS. Supported Bass Performance Hall, oversaw network, created mobile POS platforms and venue wireless to increase show revenues. Implemented facility wide mesh wireless for Arlington Convention Center. Implemented complete network at new facility for Medstar Ambulance Authority. Assisted City of Denton through an interlocal agreement and migrating the City into a fully switched Cisco fiber backbone, upgrading all servers and replacing all desktops. Migrated City's Netware 2.2, 3.3, 4.x into a single 5.x tree. Sat in Fort Worth ISD CIOs office for 2 years and Project Managed multiple teams into cabling and interconnecting 122 campuses into single routed network. Included 200+ servers to all departments and schools, a new remote-control environment for centrally deployed application and new Internet circuits.

Ingram Micro- Gen AI ML Lead

Initials- SW

Summary: SW is an innovative global IT leader with over 22 years of diversified, multi-platform experience, including 15+ years in IT development, testing, training & deployment, and 7+ years specializing in digital transformation and data augmentation using emerging technologies. With a strong focus on Generative AI, AI/ML, cloud computing (Azure, GCP, Open Source, AWS), and data science, he has spent over 2+ years driving advanced solutions in LLM/NLP, computer vision, prompt engineering, and AI/ML architecture. His mission is to help enterprises evolve from traditional process-based operations to data-driven organizations, enabling them to remain competitive in today's fast-paced technological landscape..

◆ Key Skills:

Leadership in Generative AI and Digital Transformation initiatives, driving successful delivery and execution

Development of strategic offerings, roadmaps, RFP responses, and project estimations

Strong leadership in program/project management, team development, and organizational growth

Expertise in Generative AI (NLP, Multi-modal, Automation) solution design, architect, development & deployment

Establishing industrial and academic partnerships to drive innovation

Organizational and practice development with a focus on change management (OCM)

Proficient in Agile/Scrum methodologies and tools (JIRA)

◆ Experience:

Ingram Micro – Gen AI ML Lead/ TCS– Sr Manager / Office Max – Sr Manager/ Hospira Inc – SAP CRM Lead

◆ Education & Certifications:

Master of Computer Applications (MCA) – Thapar University, India, Master of Business

Administration (MBA) in Global Management – USA , Master of Science (M.Sc. in Mathematics)

– India , Certifications: Certified in AI (Azure & GCP), Generative AI, CRM, Mobility, PMP

Certified | Agile/Scrum Certified

◆ Awards & Achievements:

Built Ingram Gen AI Chatbot (Website, Doc Repository and Database) as Ingram product to be

deployed for SMBs and Mid-market customers as Packaged Solution or AlaaS.

Ingram Micro- AI ML Architect

Initials- PR

Summary: Innovative AI/ML engineer with overall 21 years of IT experience, 7+ years of specialized experience in Machine Learning, Deep Learning (Computer Vision) and 1 + year experience in Large Language models (Gen AI LLM). Expert in implementing AI solutions using cloud-based platforms (AWS, Azure) to improve operational efficiencies, enhance decision making and impacted business revenues. I have exp in technologies such as Python, SQL, Power BI, Hadoop, pyspark, MLOPS, Agile, MLFlow, AutoML, docker, Kubernetes, ML Libraries, Data Engineering, Cloud based AI / ML tools.

♦ Key Skills:

Automated query process by creating Chatbot UI which has integration with websites
Created Chatbot UI which has integration with different document types to improve the productivity

Designed and developed machine learning pipelines to automate the end-to-end ML workflow

Deployed ML models using containerization and monitored the performance of deployed models

Automated warranty claims processing helped customer to increase productivity to process claims.

Automated custom object detection using computer vision to improve productivity for the fire control system.

Integrated FIS with Portal using Data Lake, increased plant users' parts creation productivity

Developed solution on detection of safety kit for automating safety compliance process and reduce injuries for technicians

♦ Experience:

Ingram Micro – AI ML Architect / BAE Systems –Sr Principal Data Scientist/ TCS – Associate Consultant.

♦ Education & Certifications:

Master of Computer Applications: BIRLA INSTITUTE OF TECHNOLOGY, MESRA,

Certifications: Agile Certified Practitioner (PMI-ACP) – 2024 | Project Management Professional (PMP) – 2017 | Certified Data Scientist - DELL EMC, IBM, Microsoft | Advanced Data Science

Specialization – IBM | Machine Learning - Stanford, IBM, Microsoft | Deep Learning

Specialization – Deeplearning.ai | AI Engineering Professional Certificate – IBM | SAP

Certifications – SAP XI / PI, SAP HANA, SAP BI, SAP HANA Cloud

♦ Awards & Achievements:

Star of the Month, INSPIRE, SAP Appreciation Award, (S)MILES award, IMPACT Award (BAE Systems).

Roles and responsibilities of key team members

For the hybrid delivery of proposed projects, the bulk of delivery would be from Ingram resources and input from Fulcrum. Key roles in this endeavor are list below.

- Fulcrum POC- The POC will be the first point of contact with potential prospects and assisting with the initial data gathering and any bid processes. As opportunities present themselves, deciding on fit and availability of skills and resources for desired project(s). This person is also responsible for providing quarterly management reports.
- Ingram Project Manager- Project Plan Status, schedules, Managing Issues, Risks, Mitigations, Documentation etc.
- Ingram Data Scientist- Find Gen AI use cases, built prototype and finalize use cases, Hypothesis, Data Sources, Data for use cases, benefits etc.
- Ingram Solution Architect- Understand Requirements, Solution Design & Architecture, Recommendations, Tool/Techniques/Frameworks, Security rules/regulation/ Guidelines & Compliance, Documentation etc.
- Ingram Infrastructure Lead- AI Infrastructure, AI Platform, Components: Subscription, Services, Storage, environments etc.
- Other possible Ingram roles
 - Data Engineers- Data cleaning, Preparations and Sample Data
 - Security SME- Data and AI Platform Security, Guardrails, compliance, Implementation of security rules, regulations, and compliance.
 - ML Engineers- Configuration, development, Prompt Engineering/Design, Template, Prompt and Fine-tuning etc.
 - Deployment Engineers- Deployment, Maintenance, Monitoring and Optimization, LLMOps (Deployment Automation)

Brief overview of The Fulcrum Group Inc.

The Fulcrum Group, Inc., established in 2002, has a rich history of providing comprehensive IT solutions and managed services to local government agencies, nonprofits and private organizations. The company's founders Steve Meek and David

Johnson each have over 25 years designing and implementing technology solutions for organizations, here in the North Texas area. These technology experiences span three different organizations all focused on networking, cybersecurity and end user support.

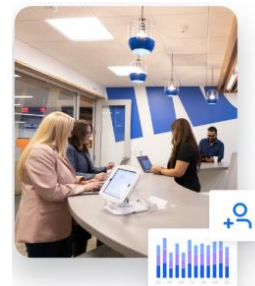
Based in the Dallas-Fort Worth area, The Fulcrum Group has built a solid reputation for its innovative approach, technical expertise, and unwavering commitment to client success. The organization began developing a managed services offering, which it branded SPOT Managed IT Services. The goal was to take expertise and processes developed at larger organizations and scale them down to provide similar capabilities to smaller and growing organizations.



Brief overview of Ingram Micro

Ingram Micro, founded in 1979, is a leading global distributor of information technology products and services, headquartered in Irvine, California. The company offers a comprehensive range of solutions, including lifecycle services, software, commerce and fulfillment services, technology services, and cloud solutions.

Ingram Micro has been at the forefront of expanding its service delivery businesses, leveraging its extensive expertise, innovative solutions and access to top vendors, to meet the evolving needs of its partner clients. The company has embraced the "Everything as a Service" (XaaS) model, offering a wide range of subscription-based services that include cloud solutions, cybersecurity, IoT and AI. This approach has allowed Ingram Micro to provide flexible, scalable, and cost-effective solutions to businesses of all sizes.



Ingram Micro Inc. brings a wealth of expertise in deploying advanced Artificial Intelligence (AI) solutions tailored for the public sector. Leveraging decades of experience in technology services, our solutions address diverse operational challenges, ensuring scalability, compliance, and cost efficiency for governmental and other entities.

Ingram's Professional Services can manage entire Generative AI projects from conception through to deployment and support. This includes initial assessments, system design, integration, customization, and ongoing maintenance and optimization.

Some Ingram Facts

- 1,500 Vendors (Including Hyperscalers)
- Packaged Solution & AlaaS
- 200,000 Channel Partners
- 161,000 Customers
- AI CoE & AI Factory
- Global Network of AI & Gen AI Expertise

More Background and History of the Fulcrum Group

Company History

Since its inception, The Fulcrum Group has been dedicated to delivering high-quality IT services that meet the evolving needs of its diverse clientele. Initially, the company focused on project-driven engagements as a value-added reseller and systems integrator for governmental entities. Through strategic growth and adaptation, The Fulcrum Group registered with the Texas Department of Information Resources (DIR) on the Centralized Masters Bid List (CMBL), further solidifying its position as a trusted partner for government IT projects.



Leadership and Expertise

At the helm of The Fulcrum Group is Steve Meek, CISSP, who serves as President and CEO. Under his visionary leadership, the company has achieved significant milestones, including certification as a State of Texas Historically Underutilized Business (HUB) due to Mr. Meek's minority status. With a business degree and technology expertise spanning networking, cybersecurity, business continuity and artificial intelligence, Mr. Meek has been instrumental in driving the organization forward, embracing technological advancements, and recognizing the critical importance of the new technology adoption journey for client organizations.



The ownership team, combined with Director Tristan Stewart, boasts a three-person leadership team with nearly 90 years of combined technology experience. This foundation ensures that The Fulcrum Group can remain at the forefront of industry trends and best practices. Before AI can be safely and securely enabled in organizations, the base computer technologies and cybersecurity must be customized and be ready to support the differing types of organizations discussed in the RFP.

Evolution into Managed Services

Since 2007, the Fulcrum Group began evolving its SPOT Managed IT Services program. What began with a service desk and basic network monitoring solution, evolved into a more comprehensive offering, more focused on repeatable processes. We detailed a formal Standards Technology Alignment Review into a quarterly strategy meeting with our clients that we call our STARpower and a variety of platform tools to help support automation and capabilities.



This process of aligning technology to organizational goals as part of an ongoing technology roadmap has helped Fulcrum Group grow as a regular member of Channel Futures MSP 501, the top 501 managed service providers in the United States. The Fulcrum Group even acquired the designation as a DIR approved vendor for Managed Services, with a dedicated local team of over 20+ experienced professionals here in the Dallas-Fort Worth area.



Evolution into Artificial Intelligence

While machine learning and heuristics have been available in various ways in various networking and cybersecurity tools, not as much has been readily available to us, until recently. While we were an early user of Chat GPT, it wasn't until last year that one of our primary vendors, Microsoft, made AI tools available to smaller organizations via Microsoft Copilot Chat, Microsoft Copilot for 365 and Microsoft Copilot Studio.

Key members of the Fulcrum Group began learning and adopting AI internally to better understand how to advise and deploy our clients in the use of Copilot and to better understand the security considerations around AI adoption. But we understand that the likes of the requirements of Microsoft can make the various Copilot options seem cost prohibitive, so plan to utilize our partner Ingram Micro as a subcontractor for more complex development and non-Copilot related artificial intelligence needs.

Community Service

The company's leadership team of President and CEO Steve Meek, Vice President David Johnson and Director Tristen Stewart reflect almost 90 years of technology experience between them. But beyond just being a for-profit business, the Fulcrum Group has believed in the importance of giving back. We have supported various nonprofits over the years but also have donated money and our time in various ways to non-profits.

Time commitments include to the IT communities of Trust X Alliance and TruMethods, on Partner Advisory Councils of technology vendors such as Digium, MailProtector and TopLeft, for Tarrant County College's Business Advisory board and in our local community with the Special Olympics. For his omni level efforts, Mr. Meek was awarded the 2024 Community Impact award, in a gala ceremony in Beverly Hills.



Past Successes

Aside from current managed services clients in the local government space, past client successes include organizations from cities/towns, school districts, local government, nonprofits, businesses and other organizations. Over the years across these organizations are project and consulting wins for Fort Worth ISD, Denton ISD, City of Denton, Denton Central Appraisal District, Bass Performance Hall, The Sid Richardson Foundation, Walker Engineering, Supreme Lending, Higginbotham Insurance and others.

Core Values

The following six areas are treated as a guiding light for all team members. They are the small amount of rules that we provide to team members to help them be successful when there is no one else around, not SOP and they need to think through a situation.

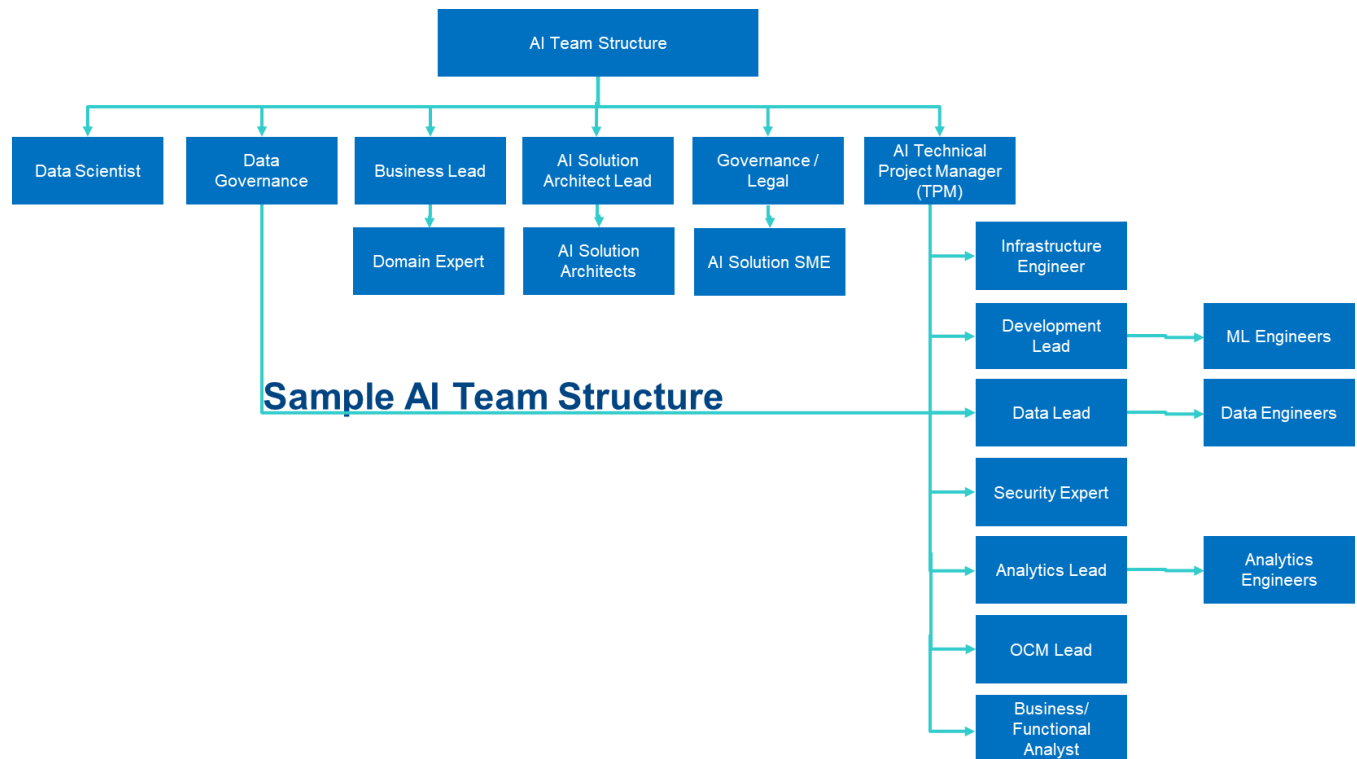
- Take Personal Ownership of Self
- Inspire Client Confidence
- Plan, Do, Review
- Look to the Future
- Actively Listen and Communicate
- Work as a Team

Additional explanation can be found on our website <https://www.fulcrum.pro/the-fulcrum-group-core-value/>

Partnerships and Collaborations

Recognizing the value of strategic partnerships, The Fulcrum Group has established a long-standing relationship with Ingram Micro, a leading global technology distributor and supplemental service provider. This collaboration enables The Fulcrum Group to leverage Ingram Micro's significant investment in skilled AI experts, data scientists and individual resources, as well as their sophisticated AI deployment framework, to deliver cutting-edge solutions to clients.

Sample Ingram AI project team structure (varies by size, scope, complexity)



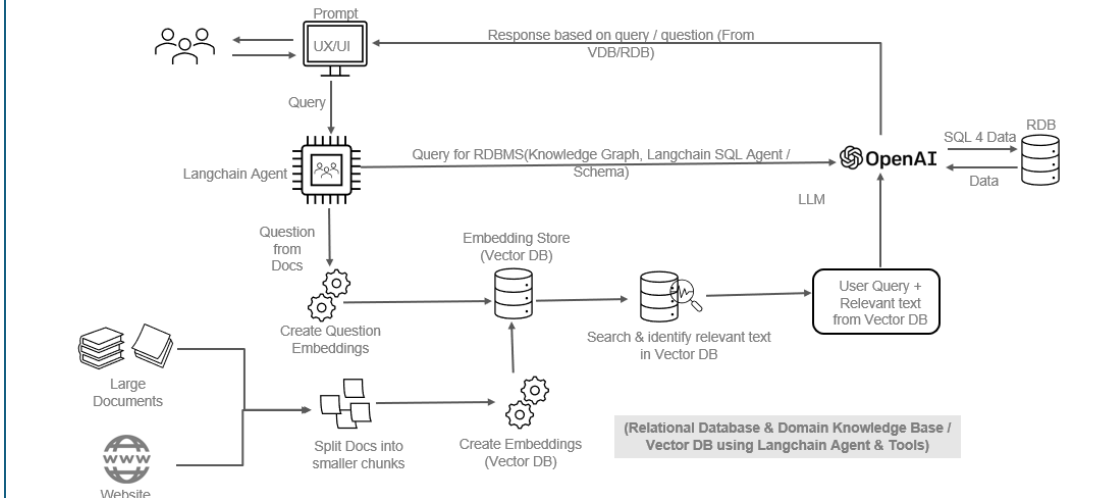
RELEVANT PROJECTS AND CONCEPTS

We believe there are pre-existing canned solutions from incumbent vendors that could fill some of these listed needs. Where we believe we will distinguish ourselves are those situations where there is no canned or existing platform specific tool or technology. We have the expertise to help connect and incorporate artificial intelligence into potential automation, data intelligence or other generative needs. Demoes are available for the Chatbot below.

Examples of Use Cases with a Proof of Concept built

- Gen AI Chatbot with
 - Website
 - Documents / Doc repository
 - Database

Reference Chatbot RAG Application Architecture

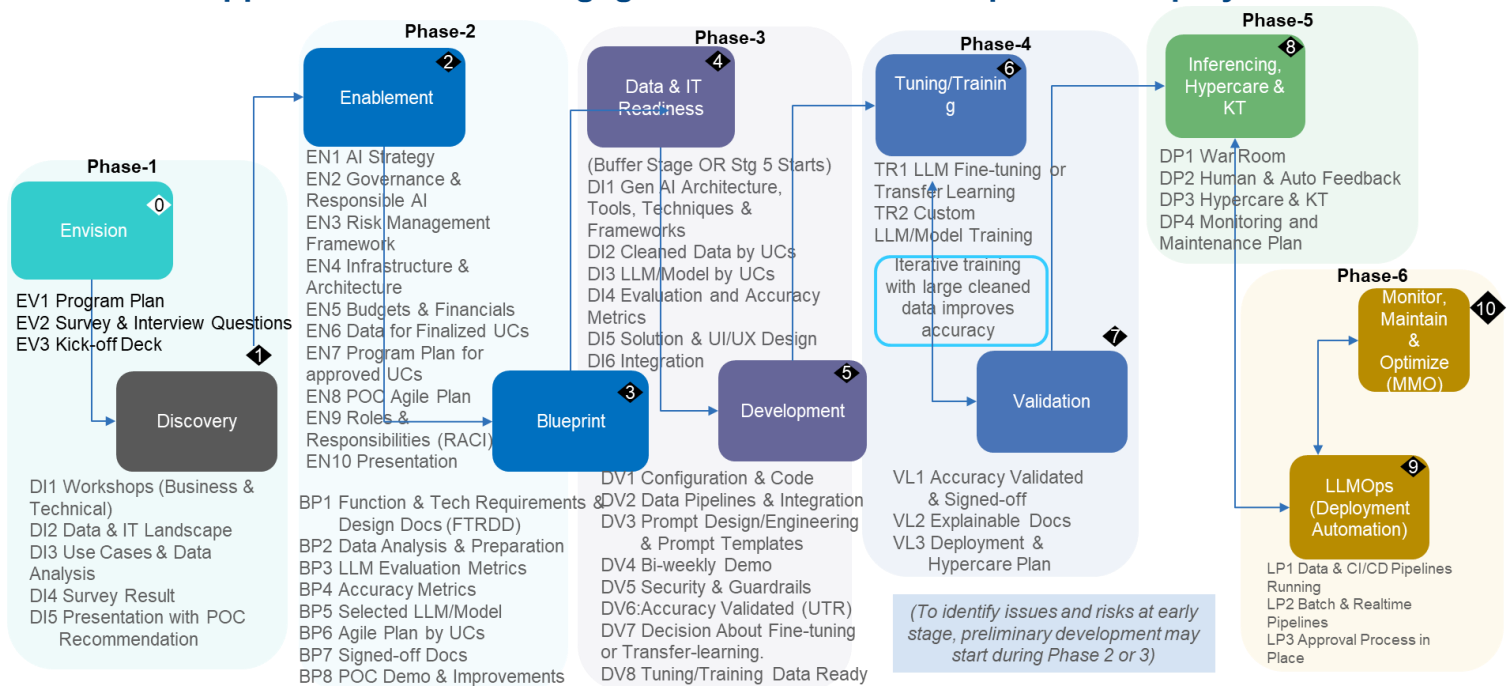


Examples of Use Cases with a Proof of Concept in process

- Complaint Management
- Issues & Resolution
- Proposal building
- E-mail Automation
- Document Processing
- Sentiment Analysis
- Leads Generation & Management

Example AI-7 Use Case- POC Citizen Engagement

Approach for Citizen Engagement Solution Development & Deployment



TECHNICAL PROPOSAL

Demonstrated experience in AI consultancy services

Planning & Management

Program Manager & Scrum Masters experts in

- Hybrid Methodology (Waterfall & Agile)
- T-Minus planning
- AI Strategy, Responsible AI & Risk Management Framework

Pool of Gen AI & AI/ML Expertise

Infrastructure, Cloud & AI Architects

- AI Program Managers and Scrum Masters
- Data Scientist
- Gen AI SMEs for building Evaluation & Accuracy Metrics for LLM Evaluation & Selection
- Data Engineers and Analytics
- AI, ML/LLMOps and Deployment Engineers
- Prompt Engineers
- UI/UX Developers

Support & Event Logistics

- 2 Weeks Hypercare for each Gen AI App deployment (Fixed Cost / T&M)
- War Room, Command Center, and Bridge Information
- Physical Relocation Information
- Triage and Support Contact Information

Gen AI Cloud Infrastructure

- CloudLogic as ACCELERATOR

Data Expertise

- Gen AI Data Analysis, Mining, Wrangling, Cleansing to prepare quality training data
- Realtime & Batch Data Ingestion

Possible Azure AI Services

- Azure ML studio, Azure Open AI studio, Azure Active Directory, Azure Key Vault, Azure Container Registry, Azure open AI service, Power BI, MS HD insight, Azure Kubernetes Services AKS

Possible Data Services

- Microsoft SQL, DB for MySQL, Azure SQL, Azure data bricks, Mongo DB, Cosmos DB, Azure pipelines, Azure SQL data warehouse, Azure service bus, Azure data factory, blob storage, Azure Synapse Analytics

Governance Dimensions

- Technical- Defines solution patterns, tools, & ops standards. Technology decision maker
- Program- Manages program/ project level tasks, financials, & schedule. Timeline decision maker
- Executive- Enforces governance model, prioritizes work, & removes obstacles. Financial decision maker.

Guiding Principles

- During the project initiation, the principles by which decisions will be made are established. They are reviewed and ratified by all 3 Governance dimensions. These become the foundations by which Placement, Migration Method, and Timelines decisions are made.
- Typically, no more than 5 Guiding Principles are used.

- Any request against the Guiding Principles is documented and reviewed via an Exception process

Innovation & Features

Unique Capabilities

- AI-Powered Decision Support: Real-time dashboards tailored for government operations.
- Enhanced Citizen Engagement: Multilingual AI chatbots accessible across devices.
- Proactive Risk Management: Predictive analytics to foresee and mitigate potential issues

Emerging Technologies

- Integration with Internet of Things (IoT) for smart city initiatives.
- Advanced Natural Language Processing (NLP) for nuanced citizen interactions.
- AI-driven compliance checks to ensure adherence to changing regulations.

Training and Adoption Strategy

Staff Enablement Plan

- Initial Training: Comprehensive workshops on AI platform usage.
- Ongoing Support: On-demand video tutorials and FAQs.
- Change Management: Dedicated personnel for assisting staff during the transition

Risk Mitigation Strategies

Identified Risks

- Data integration challenges with legacy systems
- Potential user adoption issues
- Compliance with evolving regulations

Mitigation Plans

- Extensive pre-deployment testing to ensure compatibility
- Comprehensive training programs for government staff
- Proactive updates to align with regulatory changes

Impact Metrics & Success Measurement

Key Performance Indicators (KPIs)

- Operational Efficiency: 20% reduction in administrative workload
- Citizen Engagement: 30% increase in citizen satisfaction scores
- Financial Planning: 25% improvement in budget forecasting accuracy
- System Integration: 100% seamless integration with legacy systems

Expected Outcomes

- Faster decision-making enabled by real-time insights

- Cost savings through optimized resource allocation
- Enhanced transparency and accountability in service delivery

AI solution design and roadmap sample

We have defined a core client services project strategy to assist with a typical midsized project, but that can be scaled up or down for organizational demands.

1) Discovery

Unlocking the Future with Gen AI Discovery: Tailored Insights, Innovative Solutions, and Strategic Roadmaps for Transformative Success. During the discovery process, a client might have a specific use case in mind or simply want to partner someone to identify potential use cases. Out of the discovery workshop, result deliverables and help an organization determine feasibility of initial and future projects, to make organizational decisions on readiness and capabilities.

Deliverable- Workshop

- Comprehensive Solution Design
- Actionable Use Cases and POC
- Strategic Roadmap Development
- Estimate capacity requirements and potential scaling needs
- Determine adoption lifecycle concerns
- Determine implementation support requirements
- Discuss IT staff, departmental staff or end-user training requirements



2) Enablement and Placement

Empowering AI Success: Comprehensive Governance, Strategic Enablement, and End-to-End Development Blueprints.

Deliverable- Application Placement

- Comprehensive Governance Framework
- Strategic Enablement
- End-to-End Development Blueprints



3) Development

Seamless Innovation: Accelerated Development and Integration of Gen AI Applications

Deliverable- Configuration and Development/ LLM Operations (LLMOps)

- Advanced Tools, Technologies & Frameworks
- Efficient Integration
- Scalable Solutions



4) *Tuning, Training & Validation*

Precision AI: Expert Tuning, Training, and Validation for Optimal Model Performance

Deliverable- Quality and Accuracy

- Round out pilot testing
- Advanced Model Tuning
- Establish Custom Training
- Robust Validation



5) *Inferencing & Monitoring, Maintenance & Optimization (MMO)*

Sustained AI Excellence: Seamless Deployment, Proactive Monitoring, and Continuous Optimization

Deliverable- Deployment

- Effortless Deployment
- Proactive Monitoring and Alerts
- Continuous Maintenance and Optimization



Project Management and Reporting

Approach to Project Management

We have found a hybrid approach to project management works best in these AI engagements. Waterfall elements in the earlier phases of AI project allow for a robust and fully vetted discovery process which tends to lend to a more Agile approach in the latter phases as each AI event can operate as its own sprint.

Furthermore, AI engagements benefit from the use of an internet-based workflow tool for status reporting, issue/risk logging, and task tracking. AI utilizes a SaaS implementation of JIRA for this purpose as it increases project management efficiency. Should Client restrict the use of a SaaS tool, Ingram has purpose-built templates for common PM artifacts which we can leverage as well.

Milestones and deliverables

At project initiation, our teams would co-develop a project plan which could be as simple as the one below for smaller engagements. As we create a work breakdown schedule we can identify specific tasks to accomplish or specific deliverables to measure progress on the journey to a viable end product. Below is a simple sample.

Project Plan by use cases

Phases	Wk1	Wk2	Wk3	Wk4	Wk5	Wk6	Wk7	Wk8	Wk9	Wk10	Wk11	Wk12
Kick-off & Discovery												
Enablement & Data Preparation												
Blueprint (Milestone-1)			★									
Development (Milestone-2)						★						
Prompt Engineering/Template												
Tuning/Testing/Evaluation & POC Deployment (Milestone-3)							★					
Pilot Deployment (Milestone-4)										★		
End-2-End Deployment (Milestone-5)											★	
Hypercare, Knowledge Transfer and Monitoring												
Demo Schedule and Go-live Date												
★ Milestone-1: Wk3 (Blueprint sign-off)												
★ Milestone-2: Wk6 (Development)												
★ Milestone-3: Wk8 (POC)												
★ Milestone-4: Wk10 (Pilot)												
★ Milestone-5: Wk10 (E2E)												

Reporting mechanisms and communication plan

A more complex engagement with multiple vendors and resources might benefit from a more detailed RACI matrix. A well-designed matrix helps ensure that everybody knows their roles, provides enhanced clarity on tasks, can help with resource leveling or workload distribution and drives team accountability.

Sample Responsible, Accountable, Consulted, and Informed (RACI Chart)

RACI	Project Leadership	Project Team Members	Project Sub-team	External Resources
Project Deliverables				
Discovery/Workshop Activities				
Envision - Kick-off Deck & Presentation	C	C	A	R
Workshop Planning & Schedule	I	I	A	R
Resources Allocation	I	I	A	R
Interview Questions / Survey	C	C	I	A
Lead / Conduct Workshop	I	A	R	C
Solution Design/Architecture Options with Procs and	I	A	R	C
Recommendations & Next Step	I	A	R	C
Estimation (POC/Plan/E2E)	I	A	R	C
High-level Project Plan / Communication Plan / Agile	I	A	R	C
Budget	R	R	I	A
Presentation Preparation & Phases	I	I	I	A
Enablement & Blueprint Activities				
AI Governance (Strategy, RAI, PRP)	C	C	I	A
Set-up AI CoE / AI Factory	I	I	I	A
Infrastructure Enablement	I	I	I	A
AI Platform Enablement	I	I	I	A
Domain, Business, Functional Expertise	I	I	I	A
Finalize Project Plan, Communication Plan & Agile	I	I	I	A
Data Sources & Integration	C	C	I	A
Data Analysis, Cleaning, Merging, & Wrangling	I	I	I	A
LLM Evaluation & Selection	I	I	I	A
Blue Print (Use Cases, Requirements, Solution	I	I	I	A
Development Activities				
Configuration & Coding	I	I	I	A
Unit Testing	I	I	I	A
Prompt Engg/Design/Template, Prompt Tuning	I	I	I	A
Data Preparation for Tuning/Training	I	I	I	A
Accuracy Metrics	I	I	I	A
Tuning/Training/Validation Activities				
Infrastructure & Environment Readiness	I	I	I	A
Fine-tuning/Transfer-learning	I	I	I	A
Validation	I	I	I	A
Deployment Activities				
Deployment Plan / Infrastructure and Environment	I	I	I	A
UAT / Human Feedback / PRP Readiness	I	I	I	A
Hypercare / Knowledge Transfer	I	I	I	A
(RACI) Monitoring, Maintenance & Optimization	I	I	I	A
Documentation (Explainable AI etc.)	I	I	I	A
(RACI) Monitor, Maintenance & Optimization				
Dashboard	I	I	I	A
Maintenance, Monitoring & Optimization Readiness	I	I	I	A
Alerts & Notifications	I	I	I	A

Data Security and Privacy Compliance

Compliance with data privacy laws and regulations

The power of AI is its ability to tap into reservoirs of data and provide results, analysis or generative information is desired by the organization and systems. However that requires controls all throughout data repositories and overarching platforms. As part of our engagement, we can include consultation on any data governance needs of the organization as well as how our systems would integrate. Data is fuel for AI, so data cleanup efforts are usually contributors to an AI solution success.

While public entities should be exempt, some potential end clients would have obligations to the Texas Data Privacy and Security Act (TDPSA) of 2024. These would be added into design parameters. State Representative Giovanni Capriglione, one of the co-authors of the bill, is active on the Fort Worth side of DFW at local security groups. I believe he is also been tapped to assist with a coming similar act around artificial intelligence legislation in Texas.

Threats and Compliance

Adversarial Attack	Model Inversion Attacks
Input Manipulation	Inference Attacks
Data Poisoning Attack	Model Extraction/Cloning Attacks
Model Poisoning	Trojan Attacks
Single/Multi Tenant	Evasion Attacks
SQL Injection	Reprogramming Attacks
Biased Data & Process	Denial of Service
Token Pollution	HIPAA
Prompt Injection Attacks	CJIS
Credential Theft	State Specific Regulations

Data security protocols and measures

As both Fulcrum and Ingram are highly experienced organizations around cybersecurity, they are ever mindful of differing measures for differing needs, to help protect the source data or systems.

Organizations should prioritize Identity and Access Management Systems pre-project, as five of the top ten MITRE ATT&CK® techniques observed from July 2023 to June 2024 were focused on identity. These real-world observed attacks are a primary threat vector in the cloud-based world and nailing down an identity focused security strategy, with great policies, regular hygiene, logging and review cover that biggest opportunity. Below are some of the security other measures that would be available to assist, though not exhaustive.

Authentication
Multifactor Authentication (MFA)
Authorization
Data Encryption (at rest/transit)
Policy & Monitoring
Guardrails
Identity and Access Management Systems
Centralized User Management
Virtual Private Network (VPN)

Subnet/ segmentation
Defender for Cloud Protection
Azure Arc
Azure Blueprints
Risks and Safety monitoring in Azure OpenAI Service
Web Application Firewall (WAF)
API security
Access Controls
Threat Detection and Incident Response

Ongoing data strategy evaluation

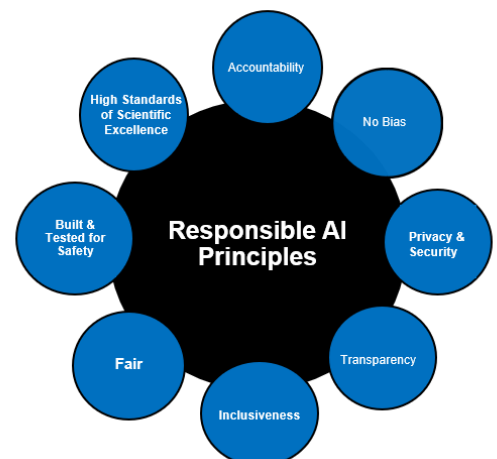
Private IP, Link & End Points
Certificates
Firewall
Policy & Monitoring
Private Workspace
Keys
Prompt Shields
Groundness Detection

LLM / Gen AI Security Monitoring and Auto Correction
Data Processing / Training on Encrypted Data
AI Assisted safety monitoring in Azure OpenAI Service
Regular Audits
Feedback & Monitoring
Adaptation to Evolving Laws
Scalable Strategies

Ethical AI Requirements

Alignment with ethical guidelines and principles

Ethical AI development and deployment are paramount to ensuring that artificial intelligence technologies are used responsibly and beneficially. Adhering to ethical guidelines and principles involves prioritizing transparency, fairness, accountability, and privacy. This means designing AI systems that are unbiased, explainable, and respectful of user data. By aligning AI practices with these ethical standards, we can foster trust, promote inclusivity, and safeguard the well-being of individuals and society as a whole.



Bias detection and mitigation strategies

We can detect data biasing using LLM features. Other strategies such as Data Analysis, basically examine your training data for representation gaps and biases to make sure it accurately reflects the situation and needs. Of course, other situations might lean towards fairness metrics, and impact assessment or simply auditing the models looking for undiscovered biases.

We start to mitigate by making sure the training data represents all groups and is diverse. We can create algorithms to re-weight or re-sample, to help reduce possible bias. But generally through transparency we work to educate users to understand how any decisions are being made and identify or eliminate biases.

PRICING PROPOSAL

Pricing models and optional services

This AI Solutions price proposal is valid for 90 days. Specific pricing can only be determined via a vendor and client discussion of desired Use Case(s), project parameters, skills needed, delivery type, project size and similar requirements understanding. We understand local government and non-profits are typically tax exempt.

Our processes allow us to feel confident we can develop solutions for all the 15 operational challenges referenced in the RFP, and add more.

Aside from any direct project costs, any additional costs related to cloud services, transaction charges, licensing, warranties, maintenance fees, special security, shipping, training or other, would be detailed for a specific scope and project plan (either by Fulcrum Group or by Ingram, in any responses). This way clients understand the entirety of costs for a complete solution.

Any optional services such as managed services, managed security services, business continuity or other would be marked optional.

Blended hourly rate card

Due to the complexity of high variability in project needs, we have chosen to select a single “blended rate” for remote work on our projects, as an option mentioned during the RFP process. Our typical blended rate is \$295/hr.

For projects completed through this RFP process, we are reducing blended labor rates 10% to \$265.50/hr. Actual project costs would be fixed fee, after a scoping process, and could end up lower. There are also offshoring possibilities that could fit for some projects and allow for a lower overall project costs.

PROPOSED VALUE ADD

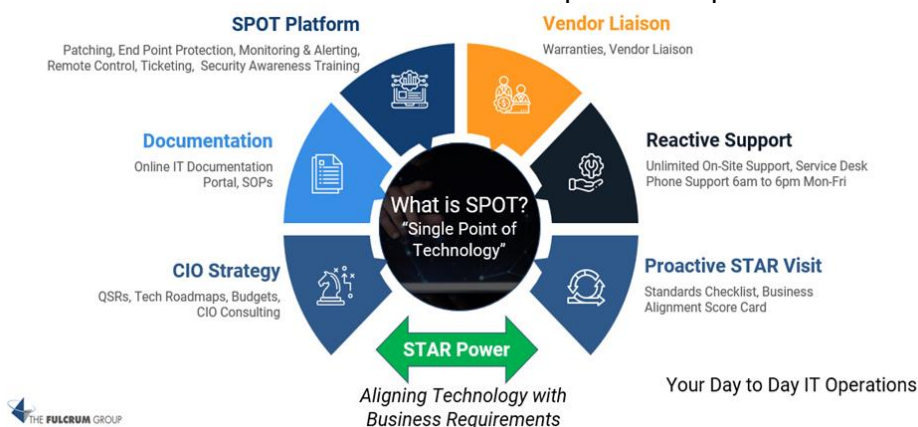
The Fulcrum Group provides all manner of technology products and services and has done so in the Dallas / Fort Worth area for many years. Our expertise spans many technologies and types of organizations. However, we have also provides managed services to clients for many years. This is a combination of remote and onsite support, from service desk to acting as a Chief Information Officer. This close relationship of co-working with organization executives provides deeper insight into organizational needs.



Fulcrum's Managed Services

The Fulcrum Group is structured in role-based positions for its client engagements. Aside from sales and marketing and accounting, the bulk of the organization is technical and in the service delivery side of things.

- The Director of Services has overall responsibility for the team, training, services quality and innovation.
- The fractional CIOs engage with our managed services clients to assist them in developing technology roadmaps and drive quarterly innovation and service reviews.
- Proactive Services visits managed services clients each quarter for hands-on review of sites and completing our best practices review process called STARpower. This assessment is utilized by the fractional CIOs and their quarterly reviews.
- The Professional Services team has multiple people as subject matter experts, guided by internal project management efforts, primarily Kanban-Agile based in nature. These Texas based SMEs provide expertise on networking, cybersecurity, cloud and many other areas.
- The Service Desk operates 6am-6pm Monday through Friday to provide support for managed services clients. There is after hours automation to page and on-call representative for emergency after hours service requests.
- Platform Services is dedicated to maintenance and continual improvement processes for our internal tools, for areas such as monitoring, cybersecurity, cloud services, business continuity, documentation, ticketing and other areas.



Fulcrum Knowledge of Texas Local Government Entries and Systems

Fulcrum Group is partnering with Ingram Micro to combine our work in local government, non-profits as a managed service provider for many years. We currently provide monthly services to cities, townships, water authorities, non-profits and commercial businesses.

We are merging Ingram Micro's AI might with our knowledge of government applications such as the ones listed below. Our insights on these application enhance the development team(s) to help them understand application relationships, security concerns, data workflow and end-user usage.

Here is a short list of some of the applications that the Fulcrum Group's support team has had interaction with over the past year, or longer.

AcSELeRator RTAC 1.31.147.4000	INCODE Client 9.00
Alibi Witness CMS 4.0	Itron Field Collection System, Field Deployment Manager
ArcGIS Pro 3.4.55405	Laserfiche Server, DS, Workflow
Athena RMS, Services, MCP, Mobile	Maltego 4
Avigilon Control Center Client 7.14	Mark43 First Responder, Desktop Integration
Axon Evidence Upload, Fleet Dashboard, View	MARPLOT 5.1.1
Bluebeam Revu x64 21	Milestone XProtect Mobile Server, VMS
COPsync 4.0.8.0	Motorola RM Server, ApxFamilyCPS
DJI Assistant 2 (Drones Series) V2.1.13.8	MyGov5
dnaFusion 8.2.0.5	ONESolutionMCT 1.00.0000
FactoryTalk Services Platform 3.00.00	"PASP ID Issuing System 3.06.000"
Flock Safety PD Tool 1.0	"PSTrax 1.0"
FMCSA eRODS 1.0.8580.21297	QGIS 3.32.3 'Lima' 3.32.3
Fortres Time Limit Manager 4.0	Revver Desktop Application 1.0.48
Getac Geolocation 1.0.190724.35	SafePace Pro 1.5.7.3
Guard-eFOTM_9.0	SALTO ProAccess Space 6.8.3.1
HID® Asure ID	Southern Software MDIS, QMS, TX RMS
ICONICS V10.97.2 CFR1	STW Software Installation 4.0
ICS Public Safety Suite, MDC	

Tyler Public Safety, EMV, Payments Processor Service	WatchGuard Evidence Library, Mobile, Video Transfer, others
VTScada 12.1.34	Whelen Command 2.3.9.0

Ingram AI Center of Excellence

Key to our ability to not only cover small to large projects, handle multiple projects or deliver a large enterprise solution is our two standing operations, separate from our core businesses designed to cultivate, grow and innovate around artificial intelligence.

The CoE for Artificial Intelligence (AI) is designed to drive innovation and support businesses in leveraging AI technologies.

Benefits:

Expert Guidance: Businesses can access expert guidance and support from Ingram Micro's AI specialists, ensuring they can maximize the benefits of AI technologies.

Vendor Partnerships: The CoE collaborates with leading AI vendors to offer cutting-edge solutions and stay ahead of industry trends. Ingram maintain a list of some of these vendors on a special line card page on their website.

Ingram Micro is a one-stop shop for everything AI, separated into the following categories:

- AI project and solutions
- AI-enabled infrastructure and data platforms
- Foundational AI hardware
- AI accelerators

See <https://linecards.ingrammicro.com/ai/> for additional vendor details.

Ingram AI Factory

AI Factory is an innovative initiative designed to streamline and enhance the development and deployment of AI solutions. Our six phase AI approach is designed to assist clients through the complexity of embracing AI for the first time.

Purpose:

Data Ingestion and Processing: The AI Factory focuses on efficiently ingesting and processing large volumes of data. This helps in creating robust AI models that can be used across various applications.

Operational Efficiency: By integrating AI into their operations, Ingram Micro aims to improve the accuracy and efficiency of their services, ensuring better outcomes for their clients.

Collaboration:

Ingram Micro collaborates with leading hyperscaler partners, such as Microsoft, AWS, Google, IBM, Nvidia and others, to develop advanced AI and Industry 4.0 solutions. These partnerships enable the integration of AI with other cutting-edge technologies like cloud computing and private 5G.

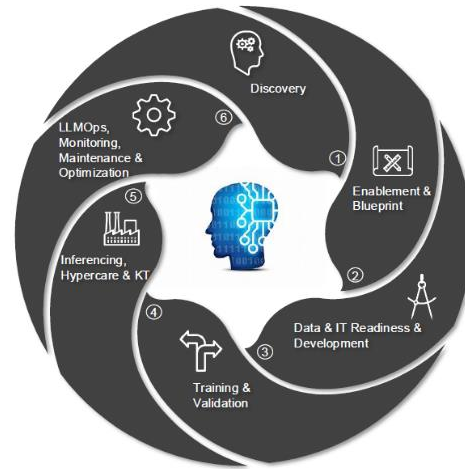
Benefits:

Enhanced Solutions: The AI Factory allows Ingram Micro to offer more sophisticated and effective AI solutions, helping businesses to innovate and stay competitive.

Scalability: The initiative supports scalable AI deployments, making it easier for businesses of all sizes to adopt and benefit from AI technologies.

Ingram Micro AI Approach

6 Phases



HUB BONUS

The Fulcrum Group is a certified HUB vendor in the State of Texas and proof is provided in PDF 12s.

REQUIRED ATTACHMENTS

All PDFs are also uploaded. The number prefix is designed to help a reader find them in the same order in the RFP document.