



**North Central Texas Council of Governments (“NCTCOG”)
Artificial Intelligence (“AI”) Consultancy Services**

Response Volume

**Request for Proposal (“RFP”)
#2025-023**

**SUBMITTED BY:
Genesis Consulting Partners, LLC
1818 Library Street, Suite 500
Reston, VA 20190**

**SUBMITTED TO:
North Central Texas Council of Governments
Attn: Purchasing Division
616 Six Flags Drive
Arlington, TX 76011**

**SUBMITTED ON:
01/13/2025**

**ISO 9001:2015
CERTIFIED COMPANY**



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1 CERTIFICATE OF OFFER AND STATEMENT OF UNDERSTANDING

Genesis Consulting Partners, LLC has provided a copy of the completed Cover Page and Addenda Acknowledge starting on the following page.

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Your Public Sector Solutions Center

REQUEST FOR PROPOSALS
For
Artificial Intelligence (AI) Consultancy Services
RFP # 2025-023

Sealed proposals will be accepted until 2:00 PM CT, **December 18, 2024**, and then publicly opened and read aloud thereafter.

Legal Name of Proposing Firm

Contact Person for This Proposal

Title

Contact Person Telephone Number

Contact Person E-Mail Address

Street Address of Principal Place of Business

City/State

Zip

Mailing Address of Principal Place of Business

City/State

Zip

Point of Contact for Contract Negotiations

Title

Point of Contact Telephone Number

Point of Contact Person E-Mail Address

Acknowledgment of Addenda (initial): #1 _____ #2 _____ #3 _____ #4 _____ #5 _____

NOTE: Any confidential/proprietary information must be clearly labeled as “confidential/proprietary”. All proposals are subject to the Texas Public Information Act.

COVER SHEET

Statement of Understanding:

Genesis Consulting Partners understands that successful Artificial Intelligence (AI) adoption begins with a thorough assessment of current organizational processes. By identifying specific opportunities for AI integration, we aim to tailor solutions that enhance efficiency and effectiveness across departments. For example, AI can optimize public safety responses, create citizen engagement tools, and enable predictive maintenance for infrastructure. Our approach ensures that each recommendation aligns with the organization's unique challenges and goals, laying the foundation for impactful AI integration. We are committed to delivering practical and strategic solutions that enable long-term success. This includes recommending the most suitable AI tools, frameworks, and applications while developing a comprehensive data strategy. Our emphasis on data quality, governance, privacy, and security ensures that AI initiatives are built on a reliable foundation. Additionally, we provide a detailed roadmap for AI implementation, outlining governance structures, timelines, milestones, and deliverables to guide the organization's transformation journey.

Genesis Consulting Partners prioritizes compliance and sustainability in all AI implementations. We ensure adherence to legal standards, such as FOIA and state or federal regulations, while establishing technical, administrative, and policy controls for secure internal AI use. To empower the organization's workforce, we offer comprehensive training and knowledge transfer, equipping employees to adopt and utilize AI tools effectively. This investment in skill development fosters an AI-ready culture and supports ongoing operational excellence. Project Deliverables vary from project to project depending on the engagement; however, some of the deliverables we intend to provide include:

- **AI Integration Assessment Report:** A detailed analysis of current organizational processes, identifying areas where AI can be effectively integrated. This report includes specific use cases, such as public safety response optimization, predictive maintenance, and citizen engagement strategies.
- **AI Tools and Solutions Recommendation Document:** A curated list of AI tools, frameworks, and applications tailored to address the organization's challenges, complete with implementation strategies, vendor comparisons, and feasibility studies.
- **Comprehensive AI and Data Strategy:** A structured plan outlining data governance, privacy measures, security protocols, and quality management practices, paired with a strategic AI roadmap that includes timelines, milestones, and KPIs.
- **Compliance and Governance Framework:** A documented framework ensuring AI initiatives adhere to legal standards (e.g., FOIA and grant/state/federal regulations), alongside technical, administrative, and policy controls for responsible AI usage.
- **Training and Knowledge Transfer Materials:** Custom training programs, user guides, and workshop materials to educate internal teams on AI adoption, tool utilization, and maintaining in-house AI operations for sustainable success.

Finally, our focus extends to demonstrating the long-term value AI brings to the organization. By quantifying its impact, we create compelling business cases that justify immediate and future investments, driving sustained adoption. We also support both pilot and full-scale implementations, providing the resources and expertise needed for success. Our inclusion of a five-year AI roadmap ensures that the organization remains ahead of technological advancements, strategically positioning itself for future growth and innovation.


2 KEY PERSONNEL




Genesis is a Small Business, Limited Liability Company, incorporated in the State of Virginia and Headquartered in Fairfax County. The company is owned and operated by three (3) partners who make up the ownership team and hold the chief officer's positions. The C-Level Executive team members serve as the executive in charge for their respective domains and support our customers as reach back and executive project support. **Jason Fair** serves as the company's CEO and operates as the executive-in-charge of our Artificial Intelligence, Strategic Services, IT Services, Business Agility, Transformation, and DevOps practices. Jason is aided by **Cleber dos Santos**, the Vice President of Delivery for our AI and DevOps practices and **Lenon Alipio**, who leads our Artificial Intelligence and Machine Learning Practice. Additionally, Jason is aided by **Beth Hatter, Don Barrett, Amy Mathis, and Donna Snyder**, who support Jason in managing accounts under his vertical.

Nick Coticchia serves as the company's COO and operates as the executive-in-charge of the Company's Digital Transformation, Accounts Payable Automation, ERP, and Acquisition Services vertical. **Bruna Navarro, Ed Stroger, Miranda Breitenfield, and Mark Block** support Nick in managing accounts under this scope. **Derek Johnson** reports to Nick and oversees our strategic partnerships and outreach with support from **Jack Gebhard**.

Cameron Chaplin operates as the company's Chief Financial Officer and is based out of our headquarters in Richmond, Virginia. Cameron is largely supported by **Sam Smith**, the Head of People and Operations and **J.D. Weiman**, who oversees all U.S.-based procurement, proposals, contracts, and capture activity, and **Lawson Stover**, who serves as the Company's Facilities Security Officer and Manager of Operations. Another unique feature of Genesis is our dedicated in-house Talent Management Team, led by **Mere Antonelli and Alex Marshall** as well as our Finance Team, led by **Jamillah Smith**. The table below provides an overview of the core individuals who will support the management of the delivery of services under this RFP:

Table 1: Key Personnel, Core Management Team Members

Name / Role	Competency and Experience
 <p>Jason Fair <i>Executive-in-Charge</i></p>	<ul style="list-style-type: none"> • Over 25 years of experience leading federal, state, local, and commercial contracts. Currently serving as a Co-owner and C-level executive of Genesis Consulting. • Extensive knowledge and experience with leading re-engineering and modernization initiatives for complex financial, supply chain, logistics, production planning, and manufacturing business operations using Artificial Intelligence, Machine Learning, and Technology. • Served as the Executive-in-Charge for Genesis' DHS U.S. Citizenship and Immigration Services and State of Nebraska Accounts. • Prior to Genesis, Jason was BearingPoint's Managing Director for the Public Services ERP Practice where he led major projects in State and Local Government, Higher Education, Aerospace and Defense, Federal Civilian agencies, Intelligence Community, and Healthcare markets. • Jason is a Certified SAFe Program Consultant (SPC), Certified Scrum Professional (CSP), Certified Scrum Master (CSM) Certified SAP Consultant (FI, CO, MM, SD), Certified Project Management Professional (PMP), and a Certified Public Accountant (CPA).

Name / Role	Competency and Experience
 <p>Cleber Dos Santos <i>Vice President of Delivery</i></p>	<ul style="list-style-type: none"> • Over 15 years of experience leading software development experience across multiples industries. Currently, Cleber serves as the vice President of Delivery for our Artificial Intelligence practice. • Knowledgeable change agent with a record of collaborating with executive leaders to shape IT strategies for global organization, managing both on and offshore teams to realize high-impact process improvements and cultural change for companies. • Currently servings as the Executive-in-Charge for our SFK AI/ML Account. • With a background in both Software Development and Portfolio Management, he has a deep understanding of the end-to-end process for delivering solutions that meet customer expectations and corporate strategy. • Master of Science in Administration, a bachelor's degree in computer science, and an MBA in Project Management. He is certified as SAFe Program Consultant (SPC), SAFe Scaled Agilist (SA), Professional Scrum Master (PSM) I, Scrum Fundamentals Certified (SFC), Agile Scrum Foundation (ASF), and Certified Project Management Professional (PMP).
 <p>Lenon Alipio <i>AI/ML Practice Lead</i></p>	<ul style="list-style-type: none"> • 10+ years of experience in the industry, with Artificial Intelligence and Data to include expertise in Data Science, Architecture, Statistics, and Machine Learning (ML) Operations across areas ranging from Retail and Insurance to Finance and Intelligence. • Proficient in Python, R, SQL, and Cloud Infrastructure. • Led the design of multiple data-based solutions, encompassing all steps of an analytical project, from ETL and Governance to ML and Automation. • MSc and MBA on Data Science related fields. • International experience working on a day-to-day basis with partners in the US, Europe, and across Latin America.
 <p>J.D. Weiman <i>Director of Procurement and Contracts</i></p>	<ul style="list-style-type: none"> • Over 14 years of experience providing contract management, procurement expertise, technical writing, data analysis, forecasting, and proposal management in working with Public Sector customers. • Currently manages the Genesis suite of Contract Vehicles and Cooperative Contracts to include GSA MAS, GSA OASIS+, four TIPS Cooperative Contracts (Texas), and Statewide Contracts with Florida, Michigan, and Minnesota. • Focused on achieving technical excellence and proposal compliance while maintaining a multitude of business relationships to further the Genesis mission and the missions of our customers. • Certified Foundations Member, Associate of Proposal Management Professionals, Certified SAFe Agilist, and Certified SAFe Government Practitioner. • J.D. possesses a master's degree in economics

3 REFERENCES

Genesis Consulting Partners, LLC has provided references below to exemplify our current customers and work.

Organization	Fairfax County Government, Department of IT
Reasoning	Genesis has been serving Fairfax County, the largest county in Virginia, since 2020 by providing expertise that relates to the scope. This includes intelligent machine design, automation, program and project management, assessment services, training & adoption, and change management. The recent implementation of Microsoft Dynamics CRM for the Vehicle, Real Estate and Business License departments leveraged Artificial Intelligence for: 1. AI-Powered Case Classification: AI models analyze incoming queries (emails, chat, or social media) to classify and prioritize cases based on urgency, customer sentiment, or topic. 2. Intelligent Routing: AI assigns cases to the most appropriate agent or department using predefined rules and historical data, ensuring faster resolutions.
Contact Person	Robert S. Barr, Jr., Program Director
Address	12000 Government Center Pkwy, Fairfax, VA 22035
Tel. Number	703-324-3802
Email	Robert.barrjr@fairfaxcounty.gov

Organization	State of Florida, Department of Children and Families (DCF)
Reasoning	Genesis has been working with DCF since 2022. Genesis supported the project and incremental updating of the system that streamlined the customer experience, improved worker efficiency, leveraged enterprise architecture, and replaced the mainframe legacy infrastructure. We deployed two cloud-based portals with the first serving as a full replacement of the customer Self-Service Portal for training. The second cloud-based portal is a new Worker Portal that will grow in functionality as each new phase completes. Our OCM efforts were designed to support project success factors. Scope includes project management, organizational consulting, assessments, analysis, DEIB accessibility, planning, and technical consulting. The project used AI to take design wireframes and flows and divide into user stories for development activities. The team used AI to take previously written user stories and create user acceptance test cases. Additionally, they used AI to develop training outlines from design wireframes and user stories. The team is now using AI to develop user guides from test scripts and user stories.
Contact Person	Sarah Monbarren, Florida System Project Analyst
Address	2415 North Monroe Street, Suite 400, Tallahassee, FL 32303
Tel. Number	850-320-9138
Email	Sarah.Monbarren@myflfamilies.com

Organization	General Services Administration (GSA), Travel Acquisition Support Branch (QMACB)
Reasoning	Genesis has been contracted to provide expert contractor support services to provide acquisition, customer experience design, and transition readiness support for the ETSNext initiative. Our scope includes solution architecture, automation, information technology project

	management, federal Travel and Expense (T&E) process analysis, customer and user experience design, data strategy, and change management communications support. SAP Concur is the solution being implemented and our team has Travel and Expense experts to guide the design and implementation of the solution. Our team will leverage key AI elements of the solution such as: Travel Recommendations: AI analyzes user preferences and corporate travel policies to recommend flights, hotels, and transportation options that are compliant. Fraud Detection: AI identifies policy violations in real-time by cross-referencing submitted expenses with corporate policies. Automated Expense Reporting: AI-driven Optical Character Recognition (OCR) technology extracts data from receipts (e.g., amount, date, vendor) and automatically populates expense reports. Vendor Matching: AI helps match expenses to the appropriate vendors and streamlines reimbursement processes.
Contact Person	Allison Hopkins, Contracting Officer
Address	1800 F St NW, Washington, DC 20405
Tel. Number	703-605-2934
Email	allison.hopkins@gsa.gov

Organization	Washington Metropolitan Area Transit Authority (WMATA)
Reasoning	Genesis Consulting was contracted to implement an Invoice, Travel & Expense, leveraging Machine Learning/Artificial Intelligence (AI) technology that fully automates the invoice capture while extracting key invoice information necessary for purchase order invoice matching services and the expansion of additional invoice related services. Scope includes project management, IT ERP Assessments, process mapping, Data Validation and Transmission, Security, Access, Storage, Reporting, and Audits, Systems Management, Training, and Help Desk.
Contact Person	Avraam R. "Ronnie" Patriotis, Director, AP Applications
Address	300 7th St SW, Washington, D.C. 20024
Tel. Number	202-494-9050
Email	ARPatriotis@wmata.com

Organization	SKF Group
Reasoning	In our work with SKF, a global manufacturer and leader in engineering solutions, we transformed their asset monitoring services by leveraging advanced AI techniques. Using machine learning algorithms, we analyzed sensor data in real-time to detect patterns and anomalies indicative of potential failures. This AI-driven system automated alerts tailored to various asset types, significantly reducing false positives and improving operational efficiency. By replacing manual analysis with a scalable, automated approach, SKF was able to grow client subscriptions to their monitoring service without increasing their analyst team size, delivering superior predictive maintenance capabilities to their customers.
Contact Person	Todd Stout, Director of Product and Portfolio Management
Address	801 Lakeview Dr, Blue Bell, PA 19422
Tel. Number	903-746-7785
Email	todd.stout@skf.com

4 PROJECT-RELATED EXPERIENCE AND QUALIFICATIONS

Provide a comprehensive overview of your organization's capabilities in AI technologies (e.g., machine learning, natural language processing), including your industry experience and any past AI implementations within the public sector.

Genesis Consulting is a leader in delivering transformative Data & AI solutions, supported by a dedicated Center of Excellence that blends multidisciplinary expertise with agile methodologies. We specialize in a wide range of AI technologies, including supervised and unsupervised machine learning, natural language processing (NLP), large language models (LLMs), simulations, reinforcement learning, and computer vision. Our tailored solutions are designed to address complex challenges such as recommendation systems, anomaly detection, predictive forecasting, and decision-support simulations. With our "From Zero to AI Value" framework, we act as trusted guides in an organization's AI journey, crafting scalable and impactful solutions that ensure measurable outcomes from the start, always aligned with their strategic goals. Genesis has a unique qualification of bringing extensive experience to multiple clients spanning Federal, State and Local Government customers, our Fortune 500 and other Commercial clients. A subset of our client has been provided below to exemplify our current markets.

Our expertise spans multiple verticals, including healthcare, manufacturing, financial services, retail, and logistics. For instance, we applied AI-driven solutions to help USCIS, a U.S. federal agency, modernize their processes. By automating identity matching across over 300 million records and creating a unified architecture for biometric and biographical data, we enhanced case processing accuracy and speed. These efforts supported the adjudication of over 100,000 immigration applications, including Afghanistan refugee intake, in less than 30 days. Beyond this, we are equipped to design predictive maintenance systems for manufacturing, energy optimization models for utilities, anti-fraud frameworks for financial services, dynamic pricing strategies for supply chains, recommendation engines for retail, and much more. At Genesis, we enable organizations to harness AI's true potential, delivering solutions that generate real and lasting value.



Figure 1: Our Capabilities

Highlight your understanding of Public Sector compliance, ethical standards, and regulations related to AI.

Genesis Consulting Partners recognizes the critical importance of compliance, ethical standards, and regulatory adherence in public sector AI initiatives. Public sector organizations operate under rigorous frameworks, such as the Freedom of Information Act (FOIA), federal and state privacy regulations, and industry-specific mandates. We understand that every AI implementation must align with these legal requirements to ensure transparency, accountability, and public trust. Our approach emphasizes building AI solutions that are not only effective but also fully compliant with data protection laws, grant conditions, and sector-specific standards, minimizing legal risks and promoting responsible AI use.

We also appreciate the ethical considerations inherent in deploying AI in public service. Ethical AI demands fairness, inclusivity, and the avoidance of biases that could harm underserved or vulnerable populations. Genesis Consulting ensures that AI algorithms and models are developed with clear ethical guidelines, fostering trust and equity. We implement robust governance frameworks that include regular audits, monitoring mechanisms, and stakeholder engagement to ensure ethical considerations remain central to AI operations throughout their lifecycle.

Furthermore, we recognize the importance of maintaining public trust through transparency and accountability. Public sector organizations must demonstrate how AI-driven decisions are made and ensure they are interpretable and explainable. We design AI systems that prioritize explainability and auditability, enabling public sector entities to provide clear justifications for AI-driven actions. We ensure that all implementations include mechanisms to address potential misuse or unintended consequences, safeguarding both the organization and the communities it serves. This commitment to compliance, ethics, and transparency positions Genesis Consulting Partners as a trusted partner for responsible AI deployment in the public sector.

Include a portfolio of successful AI strategies or implementations, especially those that align with the unique needs of local government.

Genesis Consulting has consistently demonstrated success in designing and implementing AI strategies and solutions for both private and public sector organizations. From large-scale modernization efforts to targeted optimizations, our work spans diverse challenges, including streamlining government operations and enhancing citizen services. For example, we supported USCIS in leveraging AI to transform identity management, improving accuracy and operational efficiency. Across projects, we focus on aligning AI initiatives with organizational goals, delivering solutions that drive measurable outcomes and lasting value. Our ability to address complex needs while balancing innovation and practicality makes us a trusted partner for local governments and beyond.

Our approach to AI Strategy, Solution Design, and Deployment is rooted in a deep understanding of organizational needs and a stepwise methodology. We begin with a thorough assessment of challenges and opportunities, identifying areas where AI can deliver immediate and sustainable value. Leveraging our expertise in technologies like machine learning, natural language processing, and data integration, we design scalable, future-ready solutions tailored to each use case. Deployment is guided by agile principles, ensuring seamless integration with existing systems and workflows. This holistic approach enables us to deliver AI solutions that are not only technically robust but also aligned with the strategic priorities of the organizations we serve.

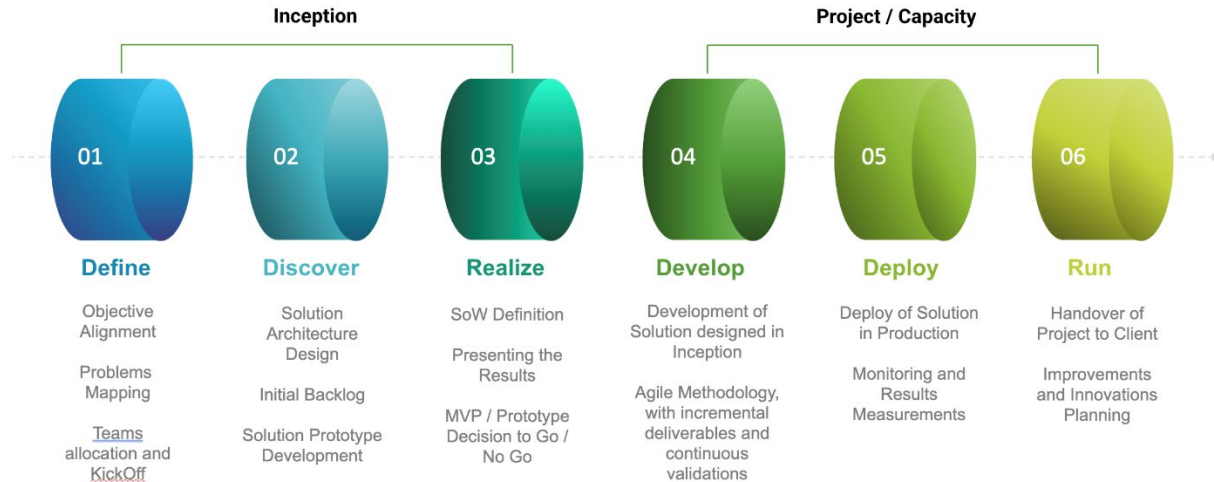


Figure 2: Our Approach to Creating an AI Strategy

Include a brief statement of the respondent's background, including years in business.



Genesis Consulting Partners, LLC is a Small Business and a strategic technology, software, and services consulting firm, focused on delivering IT solutions, enterprise agile consulting, digital transformation services, software development, technology modernization, management consulting, and training & coaching. For more than 16 years, our consultants have provided world-class Enterprise software applications, Technology Support, and Lean & Agile Solutions to customers around the globe with specific experience in the Public Sector, Utilities, and Retail & Consumer Products industries. Genesis has delivered at clients ranging from the States of Florida, Nebraska, Michigan, Arkansas, Georgia, and Virginia to the District of Columbia, Canada, Brazil, the United Kingdom, and beyond. Our team of quality Technical, Agile, and Management Consultants possess the specific expertise and project experience to provide the leadership, comprehensive support, and oversight needed for the most complex and challenging of solutions. We align our highly skilled and experienced professionals with our clients' strategic vision, mission and needs to reflect our constant goal of furthering business agility and efficiency for our customers.



Figure 3: Genesis at a Glance

Genesis Consulting is proud to be an ISO:9001 Certified Company and recognized by Inc. Magazine as one of the Fastest Growing Companies in the country. Recently, Genesis was named as one of Virginia's Top 10 Best Places to Work. As a small business, we understand the importance for our customers to choose trusted partners that have a deep knowledge and the ability to deliver across a diverse set of consulting and advisory expertise. Our team is adept at measuring and delivering performance against contract objectives and can be responsive to the changing needs of the federal, state, local, and commercial clients alike. In addition to our global experience, comes our track record in providing technology consulting, hardware, and software support services to the government entities via multiple awards, wide scope contract vehicles.

As an example, Genesis is currently leading the GSA's assessment, planning, acquisition, and PMO services for the E-Gov Travel Service (ETS) Next Generation mandatory solution to be used by over 124 civilian agencies. Additionally, we are leading global business agility transformations at commercial clients like Volvo, Johnson and Johnson, and Nike. We are delivering consulting services across numerous state and local contract vehicles across the United States to include Minnesota, Florida, Virginia, Georgia, Washington, and the District of Columbia.

Clearly state any significant requirements from the Scope of Work that you are unable to meet.

Genesis Consulting Partners, LLC has not identified any specific areas from the Scope of Work that we would not be able to meet.

If applicable, identify any subcontractors or third-party services that are utilized in the performance of fulfilling this RFP.

Genesis Consulting Partners, LLC does not currently anticipate utilizing any third-party vendors or subcontractors as part of this response at this stage. Genesis has an in-house development team for Data, AI, ML consulting services both within the United States (CONUS) and from our Any-Shore Team based in Latin America.

Provide a general explanation and chart which specifies project leadership and reporting responsibilities, and how the team will interface with NCTCOG and Participating Entities' project management and team personnel.

The following organizational chart details, in general, the reporting responsibilities and interface options with NCTCOG and participating entities' project management and team personnel. Please see Section 2 of this response for more information the qualification and roles of the individuals listed in the organizational chart.

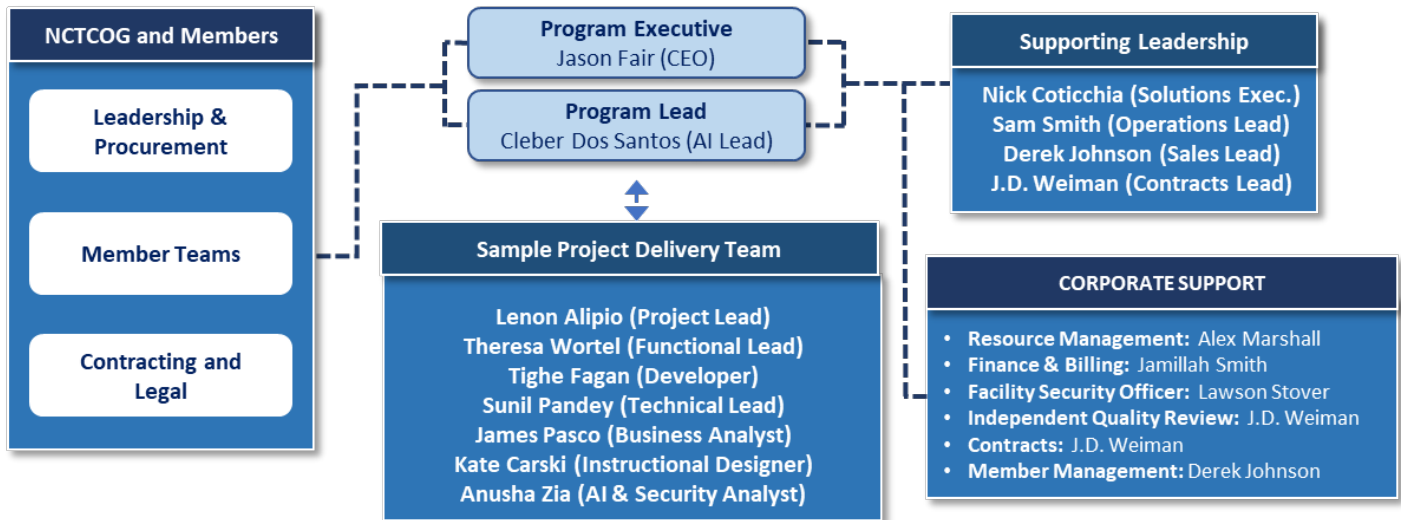


Figure 4: Genesis Team to Support NCTOCG

5 TECHNICAL PROPOSAL

Genesis Consulting's Program Management Approach combines leading practices and methods derived from our years of Business Agility, Development, AI/ML, Digital Transformation, and Consulting Experience. It aligns Goals, Objectives, and Strategies to achieve member project execution by Planning, Executing and Monitoring around program success and performance. The sections below outline our methodology to achieving the objectives and delivering across the scope areas.

5.1 Objectives

Objective	Response
Assessing current organizational processes and identifying opportunities for AI integration, with specific examples relevant to various departments (e.g., public safety response optimization, citizen engagement tools, predictive maintenance in infrastructure).	To begin, we will conduct a comprehensive evaluation of current organizational processes and workflows. This phase involves stakeholder interviews, process mapping, and departmental workshops to uncover inefficiencies and pain points that AI can address. For example, in public safety, AI might optimize emergency response times through predictive analytics, while in infrastructure, predictive maintenance can reduce costs by identifying potential failures before they occur. The insights gained will be consolidated into a gap analysis report, detailing areas where AI integration can provide tangible value.

Objective	Response
Recommending AI tools, frameworks, and applications to solve specific organizational challenges.	Building on the assessment findings, we will recommend specific AI tools, frameworks, and applications tailored to the organization's unique challenges. This phase includes a market analysis to identify the most suitable AI technologies, taking into account scalability, compatibility, and cost-effectiveness. For instance, we might propose natural language processing (NLP) tools for citizen engagement or machine learning algorithms for infrastructure maintenance. These recommendations will be compiled into a detailed implementation plan, including vendor options and technical requirements.
Developing a comprehensive data strategy alongside an AI roadmap, emphasizing data quality, governance, privacy, and security.	A robust data strategy is essential for successful AI adoption. This phase involves an audit of existing data assets to assess quality, governance, and readiness for AI use. We will establish guidelines for data privacy, security, and compliance to ensure adherence to legal standards. Simultaneously, we will craft a high-level AI roadmap, outlining short- and long-term priorities, milestones, and performance indicators. The roadmap will serve as a strategic guide, ensuring alignment with organizational goals and resource availability.
Developing a strategic roadmap for AI implementation, including governance, timelines, milestones, and deliverables.	In this phase, we will develop a detailed AI implementation roadmap, incorporating governance structures, timelines, and deliverables. The roadmap will outline key milestones, such as pilot testing, full-scale deployment, and post-deployment monitoring. Governance frameworks will include decision-making protocols, accountability mechanisms, and ongoing risk assessments to ensure that AI initiatives remain ethical, compliant, and effective.
Ensuring that all AI implementations comply with legal standards (e.g., FOIA, grant/state/federal regulations) and establish technical, administrative, and policy controls for internal AI use.	Ensuring compliance with all applicable legal standards is paramount. This phase focuses on aligning AI initiatives with regulations such as FOIA, state and federal guidelines, and grant requirements. We will establish technical controls, such as access restrictions and encryption, alongside administrative policies for oversight. Policy controls will be designed to address ethical concerns, mitigate biases, and manage risks, ensuring responsible AI use.
Providing training and knowledge transfer to the organization's internal teams on AI capabilities, ensuring employees effectively adopt and utilize AI tools.	To ensure sustainable adoption, we will provide tailored training programs for internal teams. These programs will cover AI fundamentals, tool utilization, and best practices, empowering employees to manage and expand AI initiatives effectively. Training materials will be designed to cater to different skill levels, from technical staff to leadership. This phase also includes workshops and hands-on sessions to reinforce learning and promote a culture of innovation.

Objective	Response
Quantify the long-term value AI brings to the organization and create business cases for both immediate and future expenditures, supporting sustained AI investment and adoption.	We will measure the long-term value AI delivers to the organization by evaluating cost savings, efficiency gains, and enhanced service delivery. These metrics will be used to create detailed business cases, justifying current and future AI investments. The business cases will also highlight the potential for scalability and innovation, ensuring sustained organizational support for AI adoption.
Supporting the pilot and/or full-scale implementations and providing comprehensive training for sustainable, in-house AI operations.	To ensure successful deployment, we will support pilot projects, providing technical expertise and monitoring progress. Lessons learned from pilots will inform full-scale implementations, ensuring scalability and reliability. Post-deployment, we will offer ongoing support and training to establish self-sufficient, in-house AI operations.
Incorporating a 5-year AI roadmap to guide the organization's future AI development.	Finally, we will develop a comprehensive five-year AI roadmap, aligning with the organization's strategic goals. This roadmap will outline future initiatives, emerging technologies, and evolving regulatory requirements, ensuring the organization remains at the forefront of AI innovation. By planning for long-term growth, we position the organization to continuously leverage AI's transformative potential.

5.2 Scope of Work

5.2.1 AI Strategy Development

A successful AI strategy is built on three core principles: **deep comprehension of organizational challenges**, **cutting-edge AI expertise** to address them, and a **stepwise approach that builds value progressively**. Genesis employs its **Value-Oriented AI Framework** to translate these principles into actionable, impactful outcomes, delivering measurable success from day one.

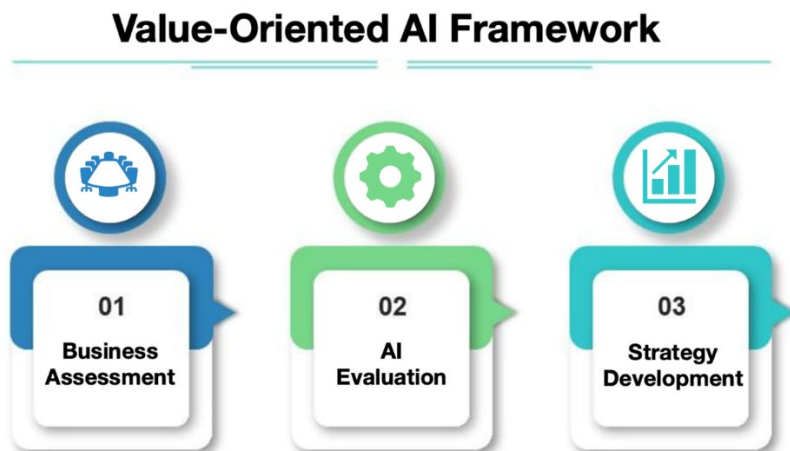
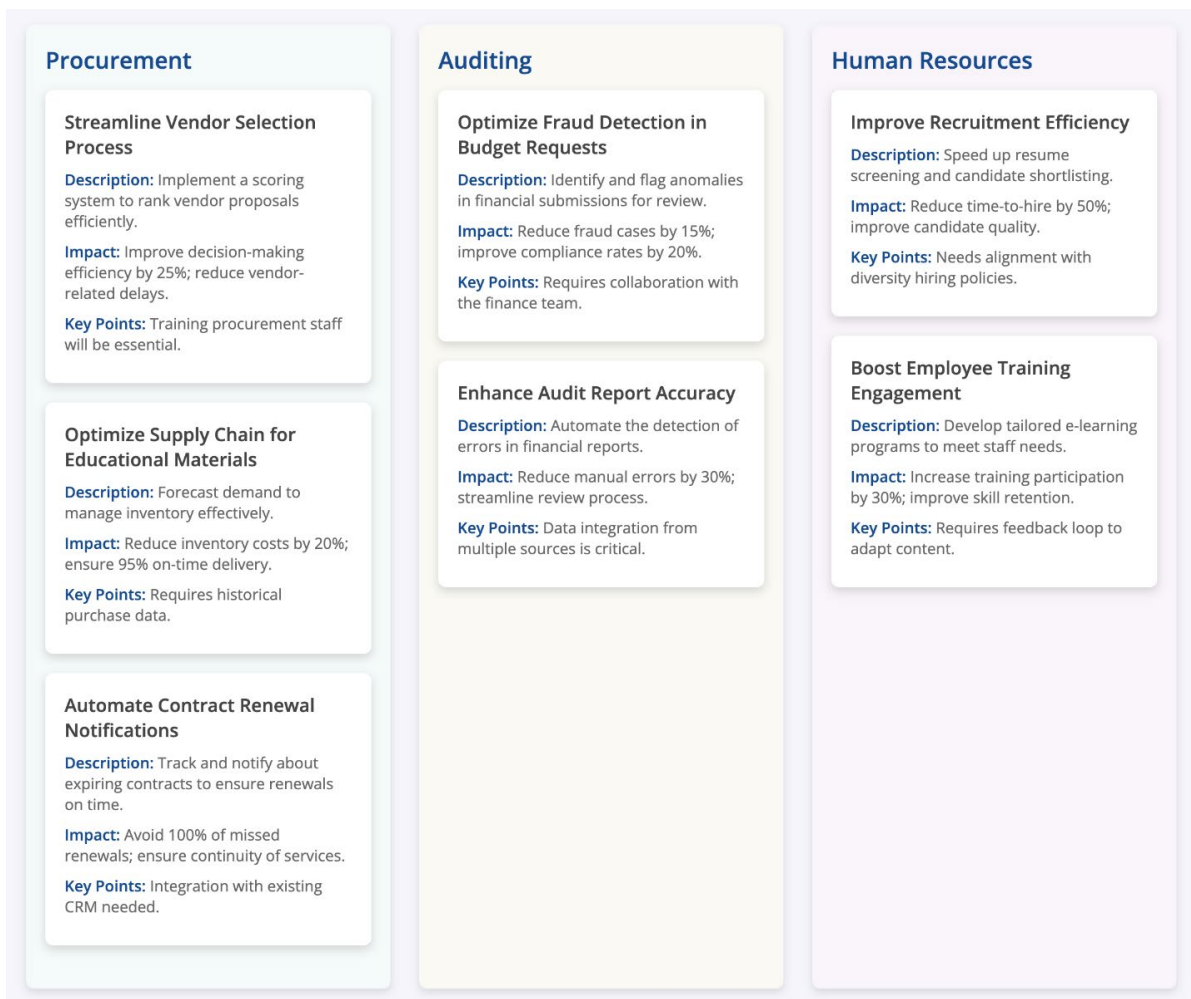


Figure 5: Value-Oriented AI Framework

Business Assessment: The first step in our framework is to conduct an in-depth business assessment by engaging with the key departments within the organization. This collaborative process helps us thoroughly understand their current processes, objectives, and the challenges they face. We work closely with stakeholders to uncover pain points, identify unmet needs, and

assess the potential impact of addressing these challenges. By doing so, we ensure that the AI strategy we develop is grounded in real, tangible business requirements and is directly aligned with the organization's goals. However, it's through direct, hands-on collaboration with the teams who are immersed in these challenges that we truly gain an understanding of the complexities at play. This close engagement allows us to pinpoint the most critical areas for improvement and tailor our approach to meet the specific needs of each department. The outcome of this phase is a comprehensive mapping of the key issues each department aims to resolve, along with a detailed assessment of the potential impact of solving these challenges. This includes a thorough analysis of each pain point, capturing the nuances and complexities that shape decision-making and execution within the organization, ensuring the resulting strategy is both practical and impactful.

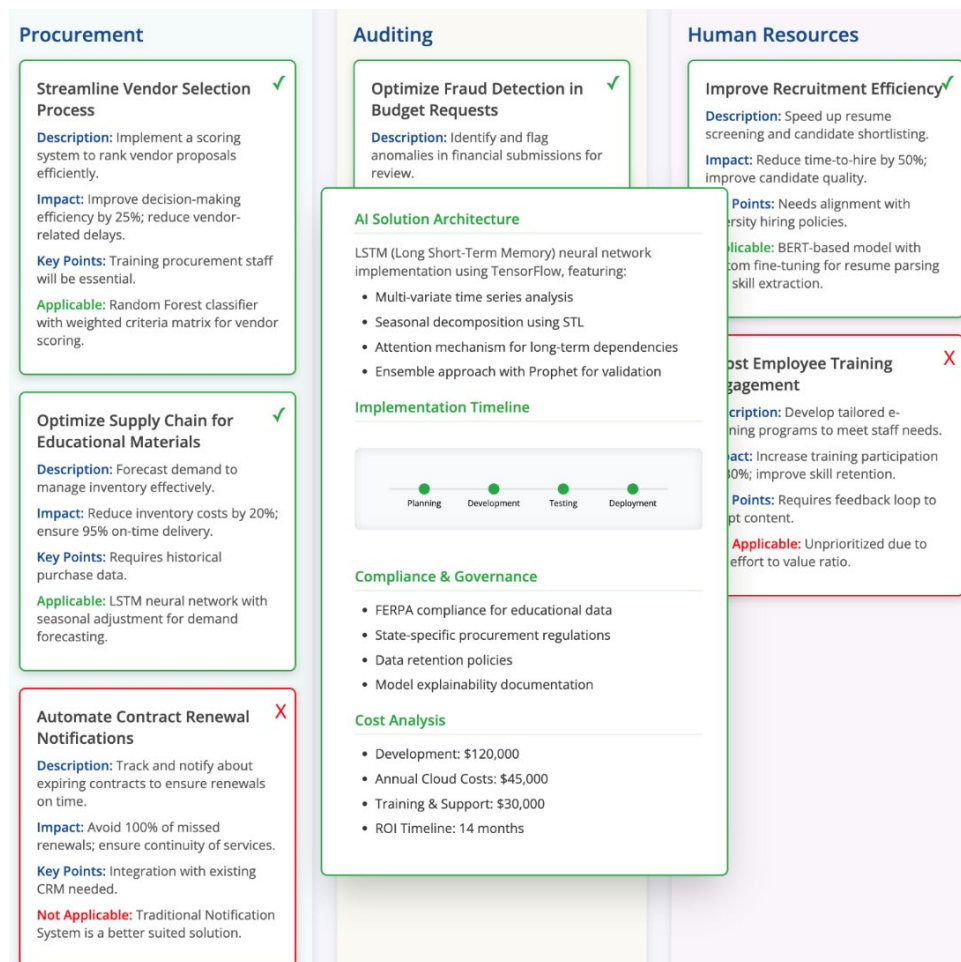
Example: Genesis has been tasked to develop an AI Strategy plan for a state education organization. By employing the Value-Oriented AI Framework, we start our work with collaborative inception sessions with key stakeholders, where we identify the core departments critical to the organization AI strategy: Procurement, Auditing, and Human Resources. In these sessions, we thoroughly analyze each department's workflows, goals, and challenges, as well as the potential impacts of addressing them. By engaging directly with stakeholders, we ensure that the insights gathered are deeply rooted in real, on-the-ground business needs, setting the stage for a targeted AI strategy. The image below summarizes the specific use cases and associated impacts gathered from these sessions.



AI Evaluation: The second step focuses on evaluating the key issues identified in the Business Assessment phase through the lens of AI. Leveraging Genesis's expertise in AI and Agile methodologies, we analyze each issue by asking critical questions: ***Is this a problem that AI can effectively solve, or would traditional approaches yield better results? If it is an AI-suited problem, what are the specific requirements to develop a solution and what are the most appropriate models and algorithms for this specific problem?***

Our Team assesses the effort-to-value ratio to ensure the proposed AI solution is both practical and impactful. For challenges that align as AI problems, we delve deeper to structure them into actionable projects, breaking down how an AI-driven solution would look. This includes outlining the necessary components, such as data requirements, technical considerations, and potential implementation pathways, while also identifying any risks or limitations to consider. The outcome of this phase is a comprehensive assessment of which issues should be addressed by the AI strategy and a clear blueprint of what an AI solution entails for each problem—covering requirements, expected effort, potential value, and key caveats. Following the business assessment, we evaluate each challenge through the lens of AI, analyzing whether AI can provide a suitable solution or if traditional methods would be more effective. For each identified Use Case, we assess the technical requirements, feasibility, and expected effort-to-value ratio.

This analysis helps us to prioritize AI-driven solutions that will deliver the most impactful results. The image below summarizes the AI solutions proposed for each use case, along with the necessary resources and potential risks (*A more detailed description of how the AI Solution Design process is conducted can be found in section 5.2.3*).



Strategy Development: The final stage of the framework involves crafting the AI Strategy itself — a comprehensive, value-driven plan designed to deliver incremental and sustained benefits over time. Grounded in the insights from the previous phases, the strategy is structured to deploy AI solutions in progressive layers, typically over yearly increments. This phased approach ensures that each successive solution builds upon the infrastructure, expertise, and value created by earlier implementations. This strategy is firmly anchored in practicality and value creation. By focusing on the specific needs and priorities identified in each department, the plan ensures that AI remains a tool to solve real business challenges, rather than an abstract goal. This avoids the pitfalls of strategies that rely on vague platitudes, unrealistic KPIs, or ungrounded ambitions. Instead, the result is a roadmap that is actionable, feasible, and directly aligned with the organization’s objectives. Resulting from this phase we output a roadmap detailing progress across defined timeframes (such as yearly, quarterly, per PI, etc.).

1. **Use Cases:** Specific AI-driven initiatives to be addressed within each timeframe.
2. **Expected Results:** Clear outcomes in terms of business impact and measurable improvements.
3. **Development Deliverables:** The specific solutions, tools, or models to be implemented.
4. **Technical Milestones:** Key infrastructure or capability enhancements to support future initiatives.

By focusing on incremental progress and tangible results, this strategy not only ensures early wins but also lays the groundwork for sustained AI-driven innovation across the organization. Building on the insights from the previous phases, we develop a phased AI strategy that incrementally addresses the identified challenges. The strategy was designed to deploy AI solutions progressively over several years, ensuring each implementation builds on the success and infrastructure of prior ones. This approach maximizes value from the start while setting up the foundation for scalable, long-term AI integration. The image below summarizes the year-by-year roadmap of use cases, technical milestones, and expected results.

	Year 1	Year 2	Year 3
Use Cases	<ul style="list-style-type: none"> • PROC: Streamline Vendor Selection Process • HR: Improve Recruitment Efficiency 	<ul style="list-style-type: none"> • PROC: Optimize Supply Chain for Educational Materials • AUDIT: Create infrastructure for Fraud Detection Improvements 	<ul style="list-style-type: none"> • AUDIT: Optimize Fraud Detection in Budget Requests
Expected Results	<ul style="list-style-type: none"> • PROC: reduce vendor-related delays by >40%. • HR: Reduce time-to-hire by 50% 	<ul style="list-style-type: none"> • PROC: Reduce inventory costs by 20% • AUDIT: Infrastructure capable of hosting >100 streaming AI models 	<ul style="list-style-type: none"> • AUDIT: Reduce fraud cases by 15%; improve compliance rates by 20%.
Deliverables	<ul style="list-style-type: none"> • PROC: End-to-end workflow for vendor scoring and evaluation • HR: Automatic candidate screening and pre-validation 	<ul style="list-style-type: none"> • PROC: Application for demand forecasting and automatic stock planning. • AUDIT: End-to-end AI Infrastructure available for all departments 	<ul style="list-style-type: none"> • AUDIT: End-to-end, automatic workflow for fraud detection and analysis.
Milestones	<ul style="list-style-type: none"> • 5-7 initial hires for the AI Division (1x Director, 1x Manager, 5x AI Engineers) • Integrated Data & AI Platform, with Procurement data 	<ul style="list-style-type: none"> • MLOps Pipelines integrated to the Data & AI Platform. • Audit & Finance department data fully ingested in the Platform 	<ul style="list-style-type: none"> • External clients data fully integrated into the Data & AI Platform. • Complete Infrastructure to develop new AI use cases on

5.2.2 Feasibility Study and Case Identification

Use case discovery is a complex process, requiring a deep understanding of an organization's unique nuances and industry-specific dynamics. When approached without a structured framework, it can lead to misaligned efforts, wasted time, and initiatives that fail to deliver value. Genesis addresses this challenge by combining its expertise in Agile SAFe methodologies with the proven **Data Product Canvas (DPC)** framework, ensuring a streamlined, effective process that consistently identifies high-impact Use Cases.

Data Product Canvas		Product Name:	Owner:	Date:	Version:
Problem <i>Ask the right questions:</i> <ul style="list-style-type: none"> What is the problem? Why is it a problem? Whose problem is it? Why, why and why...? 	Data <i>Ask the right questions:</i> <ul style="list-style-type: none"> Source Quality Access vs. Availability Process / Transformation Outputs Test / Training / Validation 	Solution <i>Ask the right questions:</i> <ul style="list-style-type: none"> Type (Analytics, ML, IA,) What will be the solution? Output expected? 	KPIs <i>Ask the right questions:</i> <ul style="list-style-type: none"> How to evaluate the model? Which metrics should be used? How much uncertainty can we handle with? AB Test – How? 	Actions <i>Ask the right questions:</i> <ul style="list-style-type: none"> Which actions will be used? Which campaigns? 	
	Hypothesis <i>Ask the right questions:</i> <ul style="list-style-type: none"> What will be tested? What are the expected responses for each of them? What should we do from each answer? What strategy should we follow? 		Actors <i>Ask the right questions:</i> <ul style="list-style-type: none"> Who is your client? Who are your stakeholders? Who is your sponsor? Who will use the solution? Who will consume the solution? Who will be impact with? 		
Values <i>Ask the right questions:</i> <ul style="list-style-type: none"> What is the size of your problem? What is the baseline? What is the uplift / savings? 	Risks <i>Ask the right questions:</i> <ul style="list-style-type: none"> What are the risks? What these risks might block? 	Performance / Impact <i>Ask the right questions:</i> <ul style="list-style-type: none"> What is the impact? How to measure it? Where you can see this improvement / performance? <i>Example:</i> <ul style="list-style-type: none"> Increase our customers base; Keep it them by Reduce Churn; Savings lost revenue + A/B Test; Reduce cost of acquisition; 			

Figure 6: Data Product Canvas

Using the DPC, Genesis identifies and evaluates opportunities by mapping organizational challenges to potential AI solutions while examining feasibility in key areas. These evaluations include an in-depth analysis of value potential, technical viability, and compliance requirements—both external (regulations) and internal (organizational policies). Additionally, the DPC provides a framework for documenting a detailed pros and cons assessment, as well as a risk-benefit analysis for each identified use case, ensuring that decision-makers have a comprehensive understanding of the opportunities and challenges involved.

In parallel, Genesis integrates essential data strategy considerations into its feasibility studies through the DPC. This ensures that every use case is evaluated in terms of data quality, governance, and integration readiness—critical components for successful implementation. The canvas also facilitates prioritization by weighing each use case's impact and ease of deployment, enabling organizations to focus on initiatives that offer the highest value with manageable complexity. With this, Genesis provides a clear roadmap from discovery to action, empowering organizations to confidently invest in initiatives that are not only feasible but also strategically aligned with their goals.

5.2.3 AI Solution Design and Roadmap

Designing effective AI solutions requires a careful balance of technical expertise, regulatory compliance, and business alignment. At Genesis, we achieve this through a combination of deep AI expertise and a structured methodology, ensuring every solution is robust, ethical, and tailored to the client's needs. By leveraging tools like the **Machine Learning Canvas**, we ensure that our solutions are not only designed to address the challenges at hand, but are also practical and ready for seamless implementation, far beyond theoretical concepts.

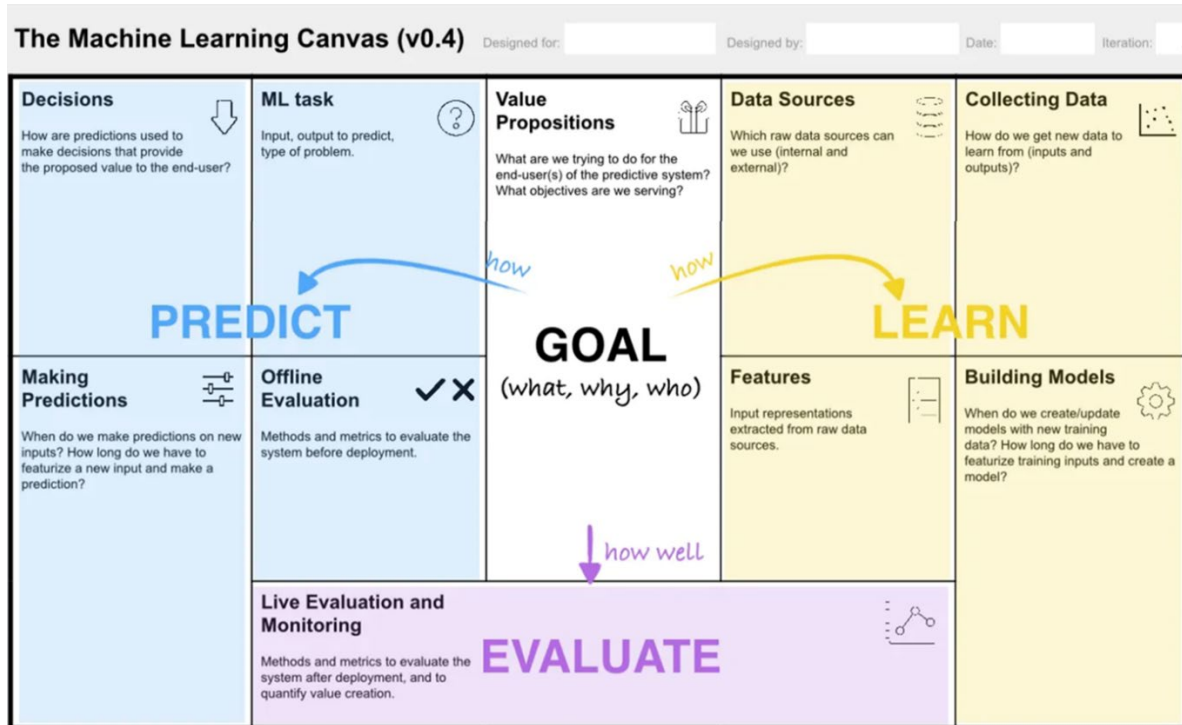
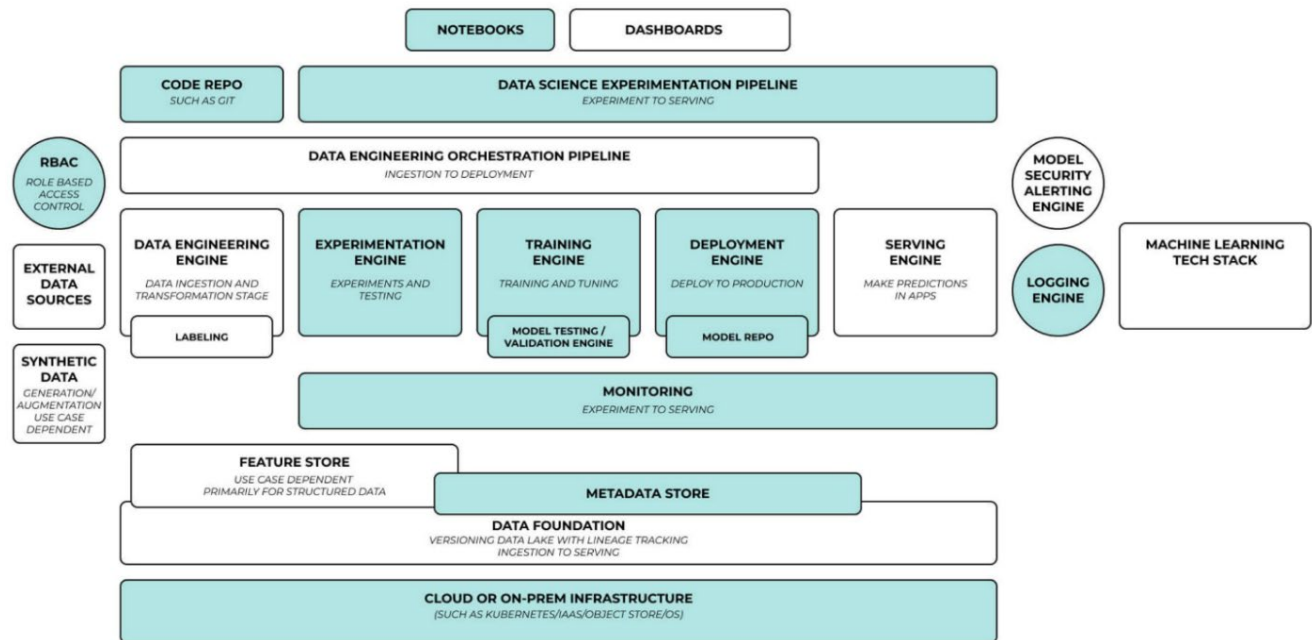


Figure 7: Machine Learning Canvas

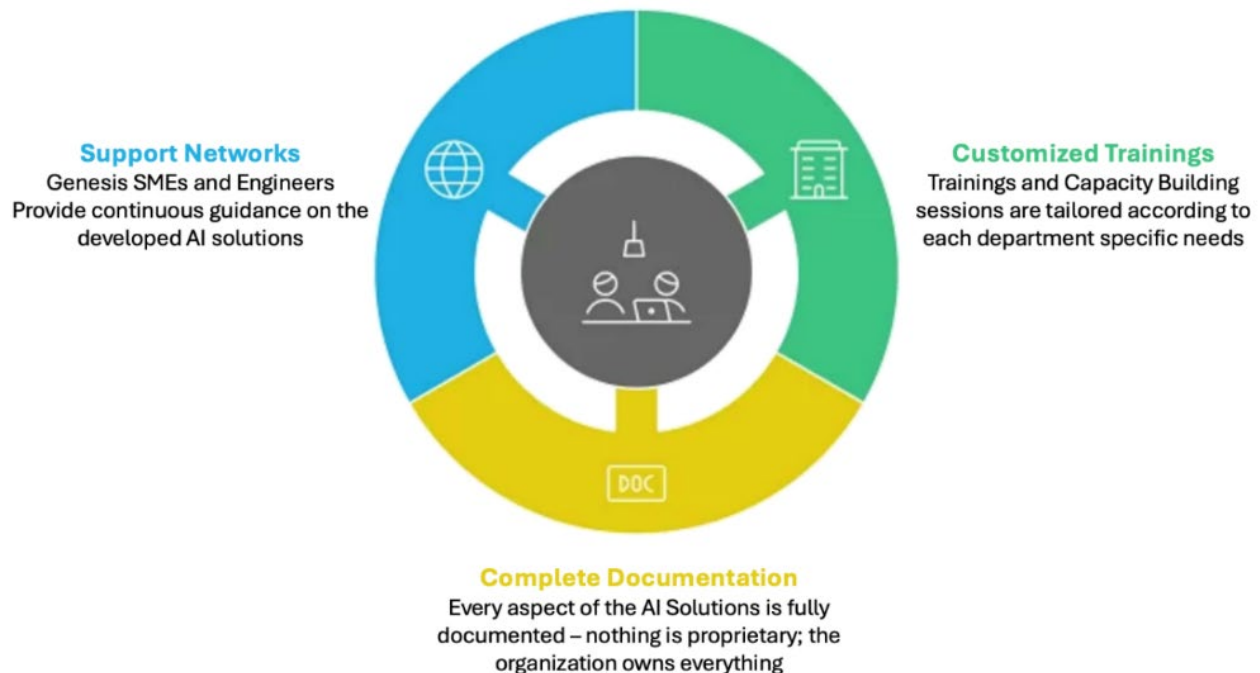
Genesis uses the Machine Learning Canvas to tackle the technical aspects of AI solution design in a structured and methodical way. The framework helps organize critical elements such as data sources, features, model building, and evaluation strategies, ensuring that the technical foundation of each solution is robust and aligned with the project's goals. Building on this structured approach, Genesis enriches the process by integrating compliance analysis, ethical considerations, and regulatory requirements to deliver solutions fully aligned with organizational and public sector standards. By combining the Canvas with our expertise in compliance and governance, Genesis provides comprehensive roadmaps that go beyond the technical scope. These include clear project milestones, governance frameworks, resource planning, and detailed cost assessments, ensuring solutions are actionable and scalable.

5.2.4 Pilot Testing and Implementation Support

Pilot implementations are inherently complex. They demand a clear definition of the hypotheses to be validated, thoughtful trade-offs between complexity and flexibility, and careful navigation of organizational processes and data architecture to ensure alignment with business realities. Additionally, proper planning is essential to ensure that the insights and deliverables from the pilot can transition into full-scale projects that generate tangible value. Genesis has extensive experience executing these implementations, skillfully balancing the complexities of developing advanced AI solutions with the unique challenges of pilot projects.



As illustrated above, implementing an AI solution involves multiple steps, all of which must be considered during a pilot. While not all steps may fall within the scope of pilot development, effective planning must address how they will be handled in production. Genesis ensures a grounded approach by thoroughly analyzing every aspect of the process. By the end of the pilot, every step needed for a seamless transition to production is carefully evaluated, even those outside the pilot's immediate scope.

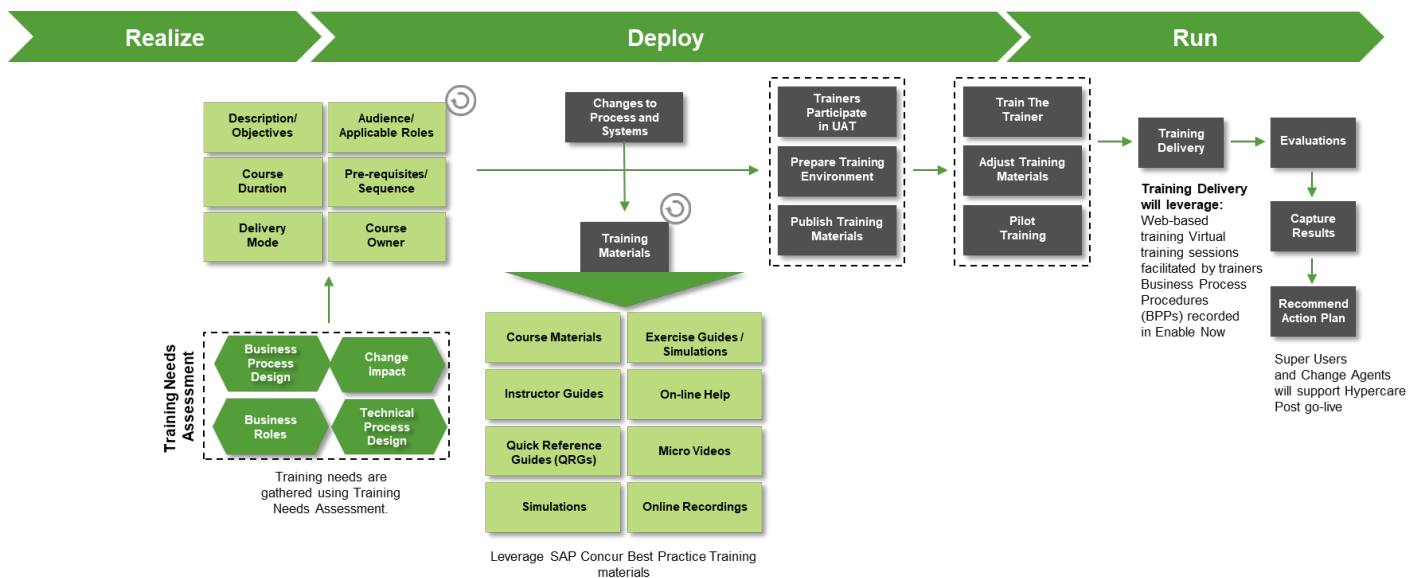


Genesis operates independently of specific vendors, choosing the best tools for each project. Pilots can be developed on any major cloud platform using the AI technologies that best align with the project's needs, a flexibility that allows us to craft pilots that truly align with the organization goals, and not just showcase potential, while lacking tangible outcomes.

5.2.5 Training, Adoption, and Capacity Support

Different departments have distinct needs when it comes to AI. Some require hands-on development skills to build and maintain AI solutions, while others would benefit more from guidance on how to leverage AI tools effectively to improve daily operations. AI training and capacity-building cannot follow a one-size-fits-all approach - Genesis recognizes this, and designs tailored training programs that align with organizational goals while addressing the specific requirements of each individual department.

Genesis excels in guiding organizations through a smooth AI adoption journey, ensuring long-term success and self-sufficiency. Beyond simply delivering training, Genesis focuses on empowering teams with the knowledge and tools to independently manage and expand their AI capabilities. By combining tailored capacity-building sessions, meticulous documentation, and ongoing expert support, Genesis ensures that every department not only understands how to use AI effectively but also has the confidence to adapt and evolve these solutions as organizational needs grow.



Genesis plans to use a variety of training material assets as part of our approach. Genesis has accelerators of training curriculum outlines for key roles including end users, approvers, accounting processors, and functional administrators of the product; these are used as foundational elements to then add specific content for training outlines that are tailored to the configuration. This includes a combination of Quick Reference Guides, Detailed User Guides, Articulate based CBT learnings, and Train the Trainer engagement.

The exact nature and type of training materials will vary from customer to customer and contract to contract.

Training Medium	Training Approach
Instructor Led Training	This will deliver the Training Live to the various role-based groups identified.
Computer Based Training (CBT)	Genesis will generate role-based training using the curriculum content in a CBT mode using Articulate Storyline. Training can be hosted on a dedicated LMS platform if this is currently available, otherwise these will be hosted on an internal SharePoint site that allows users to access training from any web enabled device or through MS Teams.
Quick Reference Documents (QRD)	Genesis will develop documents that highlight key functions or knowledge points that a user might need to reference due to infrequent use of product or to ensure adherence to policy.

5.3 Specifications and Requirements

5.3.1 Consultant Expertise and Qualifications

With over 7 years of direct experience in Artificial Intelligence, Machine Learning, Computer Vision, and Automation, Genesis has consistently delivered innovative solutions that meet the evolving needs of complex organizations. Our expertise spans requirements gathering, data integration, AI/ML Programming, and management, as well as the deployment and automation of advanced data processes using tools such as machine learning and artificial intelligence. We have successfully executed projects of a similar scale and complexity within the last five years, providing comprehensive Data and AI Consulting, Integration, and Implementation Services. Our track record of delivering value to organizations of similar size ensures that we are well-prepared to support the Member objectives, backed by industry-recognized certifications that reflect our competence in this field. We have had the pleasure of supporting important and cutting-edge technology projects to include software systems for educational entities, data security and system support for homeland security, management software and services for state government healthcare systems, and technology consulting services for a diverse set of clients across multiple spectrums. Several of our most recent projects that included AI solutions are outlined below.

Project	Public Sector	Data Modeling	AI/ML Solutions	Data Security	Project Mgt	Compliance
Fairfax County CRM	✓	✓	✓	✓	✓	✓
DHS USCIS PCIS	✓	✓	✓	✓	✓	✓
WMATA Expense/Invoice Mgt	✓	✓	✓	✓	✓	✓
Fulton County Public Schools Expense	✓	✓	✓	✓	✓	✓
Seattle Public Schools	✓	✓	✓	✓	✓	✓
State of Florida DCF ACCESS	✓	✓	✓	✓	✓	✓
U.S. General Services Administration ETSNext	✓	✓	✓	✓	✓	✓
SKF Industries	✓	✓	✓		✓	✓

Case Study: Washington Metropolitan Area Transit Authority (WMATA):



The Washington Metropolitan Area Transit Authority (WMATA) has contracted Genesis Consulting to implement SAP Concur Invoice, Travel & Expense, leveraging Machine Learning/Artificial Intelligence (AI) technology that fully automates the invoice capture while extracting key invoice information necessary for purchase order invoice matching services and the expansion of additional invoice related services. The Concur solution is fully automated, highly accurate,

enhances efficiencies, increases productivity, eliminating manual key entry that integrates seamlessly with WMATA's current ERP system, PeopleSoft Version 9.2 (PS). Our solution intakes and scans electronic invoices (PO-based, Non-PO, Capital), extracts key invoice information and in PeopleSoft electronically completes the three-way match validation to WMATA's purchase orders. Genesis's SAP Concur solution and related processes are totally automated, and any manual entry is only applied to correcting exceptions. Successful automated matches are transmitted to the PeopleSoft Accounts Payable module to complete the three-way match process and initiate the automated voucher build and subsequent invoice payments to suppliers. Genesis is now fully live with SAP Concur Invoice (June 2023) and Travel & Expense (July 2024) with both projects being delivered on time and on budget. Our solution leverages AI to automate and enhance the invoicing, expense, and travel vetting processes. For invoicing, AI can minimize processing times and reduce errors, ensuring invoices are accurate and quickly prepared. For invoice vetting, AI will be applied to improve verification and approval workflows, enabling faster and more precise checks. These advancements collectively ensure smoother financial operations, empowering the District to achieve higher compliance standards and more efficient use of resources. We also optimized P-Card management through AI-driven tools. These tools will automate and improve the handling of P-Card transactions, making the process more efficient and transparent. This approach reduces manual oversight and human error while enabling better tracking, categorization, and reconciliation of P-Card usage, ultimately supporting a more streamlined and effective financial framework.

5.3.2 Data Security and Privacy Compliance

Genesis Consulting Partners understands the critical importance of compliance with federal, state, and local data privacy laws. As a firm with a longstanding history of serving federal, state, and local government customers, we ensure that all AI solutions adhere to the applicable legal frameworks, such as the Privacy Act, state-specific data protection statutes, and any relevant sector-specific regulations. Our compliance-driven approach involves continuous monitoring of legislative updates and integrating these requirements into all stages of AI implementation. By embedding privacy considerations into the design and deployment of AI systems, we safeguard the organization against legal risks and build public trust in its services.

We are committed to providing detailed documentation that demonstrates compliance with global and local data protection regulations, including GDPR, where applicable. This documentation outlines the measures taken to uphold principles such as data minimization, purpose limitation, and user consent. For example, we ensure that data collection processes are clearly defined and justified, and we implement mechanisms for individuals to access, rectify, or delete their data where required. Our adherence to these standards is supported by regular audits, impact assessments, and transparent reporting to ensure alignment with the highest standards of data protection. In accordance with federal regulations and based on our practices of serving our Department of Defense, Department of Homeland Security, and NASA customers, our team protects sensitive and personal information during data processing, we implement robust security measures that align with industry best practices. These include encryption of data at rest and in transit, role-based access controls, and secure authentication protocols. Additionally, we establish comprehensive incident response plans to address potential data breaches swiftly and effectively. By integrating security measures into the AI lifecycle—from development to deployment—we ensure that sensitive information remains protected against unauthorized access.

Case Study: Department of Homeland Security (DHS), United States Citizenship and Immigration Services:



U.S. Citizenship and Immigration Services

The U.S. Department of Homeland Security (DHS), Citizenship and Immigration Services (USCIS) is the federal agency that oversees and administers the country's naturalization and immigration system. On a typical day, over 19,000 USCIS employees work to adjudicate over 25,000 requests for immigration benefits, field over 50,000 phone calls, serve 2,200 customers at 86 field offices across the US, and welcome 2,000 new citizens at naturalization ceremonies. On average, USCIS.gov hosts 335,000 unique sessions daily, and at over 130 application support centers, fingerprints and photographs 13,000 people as part of the identification verification process.

Genesis was tasked to lead the agile development teams that are providing a modernized system and environment to facilitate the centralized collection and development of a single authoritative source of trusted biographical and biometric information.

As part of our tool kit of processes and activities, we leverage the following data security, governance, and compliance practices:

Component	Activities\Practice	Output\Measure
Data Security and Governance	<ul style="list-style-type: none"> Developing and implementing data governance policies that align with industry regulations (e.g., GDPR, CCPA). Establishing data stewardship roles to oversee data management and ensure compliance with governance policies. Implementing data security measures, including encryption, anonymization, and data masking, to protect sensitive data. Conducting regular audits and compliance checks to ensure adherence to data governance frameworks 	<ul style="list-style-type: none"> Data governance framework and policy documentation. Role-based access control (RBAC) setup for data security. Compliance audit reports and risk assessments
Compliance	<ul style="list-style-type: none"> Implementing data quality management tools to continuously monitor and resolve issues like duplicate data, missing values, and inconsistencies. Setting up data validation rules and automated alerts to detect and correct data quality problems in real-time. Conducting regular data audits to assess data quality and ensure compliance with established standards. 	<ul style="list-style-type: none"> Automated data quality reports and dashboards. Data validation rules and alerts. Regularly scheduled data audits and improvement plans.

To further adoption, compliance, and success, we also provided multiple training events and workshops to acclimate Product Ownership Teams with their roles, responsibilities, and level of commitment needed by the to successfully transform and adopt the methodology and solution. We trained more than 40+ POs across three USCIS divisions, delivering over 30 classes to over 600 participants.

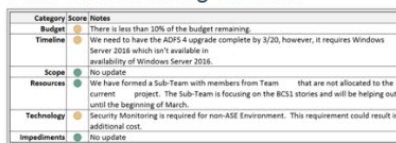
5.3.3 Project Management and Reporting

Genesis Consulting Partners recognizes the importance of clear communication and regular engagement with the organization's project management team to ensure the success of the project. We often provide consistent project status updates through written reports and attending weekly or bi-weekly meetings, as agreed upon. These updates will outline progress against milestones, address any challenges or risks, and detail next steps, ensuring transparency and alignment throughout the project. By fostering open communication, we build trust and ensure that the organization remains informed and involved in every phase of the project.

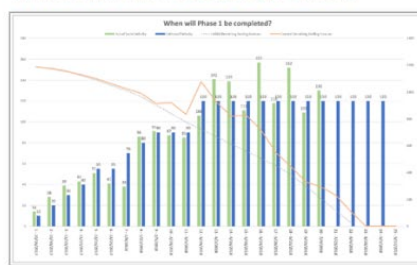


We also understand the significance of delivering a comprehensive final report that encapsulates the project's findings, recommendations, implementation outcomes, and lessons learned. This document will serve as a valuable resource for guiding future initiatives and sustaining the benefits achieved during the engagement. Additionally, Genesis Consulting Partners is committed to meeting all project deadlines and submitting required documentation promptly. Our proven project management approach ensures timely delivery of high-quality outputs, enabling the organization to achieve its objectives efficiently and effectively.

How are we doing overall?



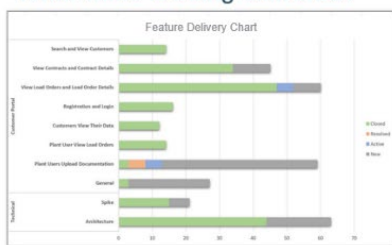
When will the release be done?



Are we on track with costs?



What value is being delivered?



What are the key release dates?



How are we measuring Quality?

Example: At USCIS, on the project referenced above, Genesis developed business operational performance metrics (e.g. value, meeting business needs, productivity, service quality, system effectiveness) using Agility Health assessment tool. The Agility Health enables us to get an initial benchmark measure of our agile team's health and performance to identify Team Growth Items

(TGIs) and Organizational Growth Items (OGIs). In addition, our Atlassian SMEs built multiple Jira and Confluence dashboards at team, program and portfolio levels to evaluate how each ART is meeting their business and technical objectives. Below is the list of top reports that is currently being used by each team: Burn Up Chart, Test Coverage and Defect %, Feature Progress Report, Program Predictability Measure, Cumulative Flow Diagram, CI/CD efficiency, and DevOps Health Radar. As a result of these reports ARTs can forecast their capacity and do a better job to commit to the PI objectives that is reasonable. In addition, Genesis delivers analytical reporting and multiple workshops (inspect and adapt, budget planning, and impact assessment) to support lean budget/business case justifications for system enhancement/modernization, consolidation, and/or disposition in alignment with the IT Strategy and roadmap. Using our metrics-based approach and new dashboards, Genesis established a Lean Agile Budget processes which enabled IT and Business Leadership to be more predictable and flexible.

5.3.4 Budget and Cost Estimates

Genesis Consulting Partners is committed to providing a transparent and detailed cost breakdown for all services delivered. This breakdown will include consultancy fees, software licensing costs (if applicable), and any other anticipated expenses, such as training materials, travel, or specialized resources. By offering clarity on the financial aspects of the engagement, we ensure that the organization can make informed budgeting decisions and maintain control over project expenditures. Our approach includes proactive communication about any potential cost adjustments, avoiding surprises and fostering trust throughout the engagement. We also offer flexible pricing structures tailored to the scope and needs of the project. For well-defined deliverables, we provide fixed-price contracts that offer predictability and control over costs. Alternatively, for projects requiring flexibility due to evolving requirements, we recommend a time-and-materials pricing model, ensuring that the organization only pays for the services rendered. This adaptability allows us to align with the organization's financial and operational goals, providing value-driven solutions that deliver measurable results.

Example: At USCIS, using our metrics-based approach and new dashboards, Genesis established a Lean Agile Budget processes which enabled IT and Business Leadership to be more predictable and flexible. As part of this process we noticed that the cross collaboration between Business Owner and OIT leadership resulted in identifying new work that had higher priority and was initially not scheduled when an unanticipated event occurred, such as COVID-19, mid-development. Our changes in processes allowed USCIS to reprioritize the Value Streams and adjust the budget plans based on the new changes. Changes were quickly communicated to the Program and Team level mid-PI to allow for immediate action. As an example, during COVID-19, PCIS budget was reduced by more than 20%; however, the leadership team was able to provide mitigation strategy for each value stream and changes such as updates to the Features/User Stories and Acceptance criteria took place within a single sprint. Such changes allowed our project to finish on time and in scope even through the unforeseen and unplanned changes caused by COVID-19.

5.3.5 Data Strategy and Cost Estimates

Data Quality Controls:

Genesis employs a robust methodology to ensure data quality, recognizing that accurate and reliable data is fundamental to successful AI implementations. To maintain data integrity and accuracy, we establish comprehensive data quality controls tailored to the organization's needs. These controls include automated checks, such as range validation, duplication detection, and anomaly identification, to verify that all data used in AI models is consistent and error-free. We also conduct periodic audits of the data pipeline to ensure adherence to quality standards

throughout the AI development lifecycle, minimizing risks associated with flawed data.

Our methodology includes clearly defined data validation and enrichment procedures to enhance dataset quality. Data validation processes focus on identifying inaccuracies, inconsistencies, or gaps in the datasets, using advanced tools and techniques such as schema validation and statistical analyses. Once identified, inconsistencies are addressed through corrective actions, such as data cleaning or re-sourcing. To further enrich datasets, we implement strategies like feature engineering, merging supplementary data sources, and leveraging domain expertise. These enrichment procedures ensure that datasets are not only accurate but also comprehensive and contextually relevant, enhancing the performance and reliability of the AI models.

Data Governance Framework:

Genesis Consulting Partners employs a comprehensive governance strategy to ensure responsible and transparent data management throughout AI implementation. Our strategy begins with the establishment of clear policies for data ownership, usage rights, and stewardship roles. We work collaboratively with stakeholders to define who owns, controls, and has access to organizational data, ensuring that responsibilities are clearly delineated and documented. Data usage policies outline permissible and restricted uses to prevent misuse or misalignment with organizational objectives, while stewardship roles focus on accountability for maintaining data integrity and compliance. These policies create a structured framework for ethical and effective data management.

To support compliance with public sector regulations, we provide detailed governance documentation that aligns with applicable laws and standards. This includes outlining processes for version control and data lineage tracking to ensure transparency in data handling. Version control systems track changes to datasets and associated documentation, enabling accountability and reproducibility. Data lineage tracking maps the origin, movement, and transformation of data throughout its lifecycle, fostering trust and regulatory compliance. By documenting these processes and providing user-friendly tools and training, Genesis Consulting Partners equips the organization with a sustainable governance structure that ensures compliance and supports ongoing innovation.

Data Privacy Assurance:

Genesis Consulting Partners adopts a privacy-first methodology to ensure compliance with data privacy laws such as GDPR, CCPA, or other relevant local legislation. Our approach begins with a comprehensive review of the organization's data handling practices to identify any gaps in compliance. We implement robust policies and technical safeguards to uphold key privacy principles such as data minimization, purpose limitation, and lawful processing. By embedding these standards into every phase of the AI model lifecycle, we ensure that data is handled responsibly and in full alignment with regulatory requirements. Regular audits and impact assessments are conducted to maintain ongoing compliance and to adapt to changes in legislation or organizational needs.

To protect sensitive information, we incorporate methodologies such as data anonymization and pseudonymization. These techniques ensure that personal identifiers are either removed or replaced with non-identifiable surrogates before data is processed by AI models, mitigating privacy risks. Additionally, we create a protocol for obtaining and managing data consent, ensuring that individuals are informed about how their data will be used and that their preferences are respected. This includes designing user-friendly consent mechanisms, maintaining accurate consent records, and enabling individuals to modify or revoke their consent easily. These

practices, combined with our focus on privacy by design, provide a secure and transparent framework for managing sensitive information throughout the AI lifecycle.

Data Security Protocols:

Genesis Consulting Partners employs a multi-layered methodology to ensure robust data security throughout the AI project lifecycle. Our approach begins with implementing industry-standard measures such as encryption for data at rest and in transit, ensuring that sensitive information remains protected from unauthorized access. Role-based access controls are established to limit data access to authorized personnel only, with periodic reviews to address evolving organizational needs. We also conduct comprehensive risk assessments to identify potential vulnerabilities in the data handling pipeline, enabling proactive mitigation strategies. These practices collectively minimize the likelihood of security breaches and ensure data integrity.

To address potential data breaches or security incidents, we develop a detailed response plan that specifies roles, responsibilities, and actions for rapid containment and resolution. This includes incident detection protocols, escalation pathways, and communication strategies to inform stakeholders promptly. In addition, we ensure that secure data storage and backup practices are in place, such as automated backups, geographically redundant storage, and regular testing of recovery procedures. These measures protect against data loss and ensure that critical information can be restored in the event of system failures or cyberattacks. By combining preventive and responsive strategies, Genesis Consulting Partners delivers a comprehensive framework for safeguarding organizational data.

Ongoing Data Strategy Evaluation:

Genesis Consulting Partners incorporates a dynamic and adaptive approach to data strategy to ensure it remains effective amidst regulatory changes and technological advancements. Our methodology includes a plan for periodic evaluations, which involve scheduled reviews of the data strategy to identify gaps or areas requiring updates. These reviews will assess compliance with new regulations, such as changes to privacy laws, and evaluate the integration of emerging technologies that could enhance data management or AI performance. We also establish mechanisms for continuous feedback from stakeholders, ensuring the data strategy evolves in alignment with organizational goals and external requirements. Detailed documentation of these updates ensures transparency and ease of implementation.

To empower the organization to sustain its data strategy, we provide comprehensive training and workshops for internal teams. These sessions are tailored to the organization's specific needs and cover topics such as data governance, compliance requirements, and best practices for data handling. Through hands-on workshops and interactive discussions, team members will gain the skills needed to monitor, manage, and update the data strategy independently post-consultation. Additionally, we supply user-friendly reference materials and offer ongoing support to address any questions or challenges that arise. This holistic approach ensures the organization can confidently uphold and adapt its data strategy over time.

5.3.6 Ethical AI Requirements**Ethical Framework Alignment:**

We employ a rigorous methodology to ensure that proposed AI solutions align with industry-standard ethical guidelines and the organization's specific principles. Our approach begins with a thorough review of ethical frameworks such as the IEEE Global Initiative on Ethics of Autonomous and Intelligent Systems and the EU Ethics Guidelines for Trustworthy AI. These standards are mapped against the organization's mission and values to establish a tailored ethical baseline for

AI development. Every phase of the project, from design to deployment, incorporates this baseline to ensure that the AI solutions are transparent, accountable, and aligned with both global best practices and the organization's unique priorities. Regular ethical audits and stakeholder consultations further reinforce adherence to these principles.

To integrate fairness and inclusiveness into AI development, we adopt a proactive approach that addresses potential sources of bias at every stage. This includes conducting fairness assessments during data collection to ensure diverse and representative datasets, as well as auditing algorithms for unintended bias using explainable AI (XAI) tools. We involve a broad range of stakeholders, including representatives from underserved or marginalized communities, to ensure that AI outputs serve all demographics equitably. Additionally, we implement mechanisms for continuous monitoring and improvement, enabling the organization to detect and mitigate any emerging biases over time. By embedding fairness and inclusivity into the AI lifecycle, we help the organization build systems that foster trust and equity while avoiding discriminatory outcomes.

Bias Detection and Mitigation:

Genesis developed a structured methodology to identify and mitigate bias in both training data and algorithms, ensuring AI solutions are fair and equitable. Our approach begins with a comprehensive analysis of the training data to identify potential biases, such as over-representation or under-representation of certain groups. We implement data preprocessing techniques, including data balancing, augmentation, and feature selection, to address these disparities. During algorithm development, fairness constraints and bias mitigation techniques—such as reweighting or adversarial debiasing—are applied to reduce the risk of biased outputs. These steps are complemented by thorough testing using fairness metrics to ensure the models meet industry standards for equity and inclusivity.

To maintain fairness over time, we propose robust ongoing monitoring techniques to track bias throughout the deployment and operation of the AI system. This includes implementing automated monitoring tools that evaluate model outputs for potential biases against key performance indicators (KPIs) tied to fairness and inclusivity. Periodic audits are conducted to assess the system's behavior in real-world applications and to address any new sources of bias that may emerge. Feedback loops are established, allowing stakeholders to report discrepancies or concerns, which are then addressed through model retraining or updates to the data pipeline. By combining proactive mitigation with continuous monitoring, Genesis Consulting Partners ensures that AI systems remain transparent, equitable, and aligned with organizational values.

Transparency Protocols:

Our approach is fundamentally designed to ensure that AI models are transparent and understandable for relevant stakeholders. This involves incorporating explainability tools and techniques, such as SHAP (Shapley Additive Explanations) or LIME (Local Interpretable Model-Agnostic Explanations), into the model development process. These tools enable stakeholders to understand how specific inputs influence AI decisions, ensuring that the decision-making logic is accessible and interpretable. Regular stakeholder briefings and workshops are conducted to demystify technical aspects of the AI models, empowering non-technical users to confidently leverage AI outputs in decision-making processes. This focus on transparency fosters trust and ensures

alignment with organizational goals.

A robust documentation process is integral to our approach, providing comprehensive insights into the AI system's inner workings. This documentation includes detailed records of data sources, preprocessing steps, and data validation processes to ensure the provenance and integrity of the data used. The decision logic of the models is meticulously documented, outlining key algorithms, rules, and parameters that influence outcomes. Additionally, model outputs are systematically recorded and analyzed to provide a clear trail of how predictions or decisions were generated. This documentation serves as both a reference for stakeholders and a foundation for future audits, updates, or enhancements, ensuring the AI system remains understandable, reliable, and accountable over time.

Accountability Measures:

We define accountability measures for AI development and use, ensuring all actions, decisions, and model changes are tracked and documented. This begins with establishing a version control system that records every modification to the AI model, including changes to algorithms, data inputs, and configuration settings. Each step of the development process is tied to specific roles and responsibilities, ensuring that team members are accountable for their contributions. Additionally, we implement comprehensive logging mechanisms that capture model decisions and their underlying reasoning, enabling a clear trail of accountability for every output generated by the system. These measures provide transparency and ensure that the organization can address potential issues swiftly and effectively.

To ensure ongoing compliance with ethical standards, we propose a robust AI auditing framework. This framework includes periodic audits to evaluate the system's alignment with ethical guidelines and organizational principles. The audits assess factors such as fairness, accuracy, transparency, and compliance with data privacy laws. Automated tools and human oversight are combined to detect deviations or potential risks in the AI's operation. Stakeholder feedback is also integrated into the auditing process, ensuring diverse perspectives are considered. Audit findings are documented and used to refine the AI system and associated processes, creating a continuous improvement loop that upholds accountability and ethical integrity throughout the AI's lifecycle.

Impact Assessments:

Our Team conducts regular ethical impact assessments to evaluate the societal, cultural, and operational implications of AI systems. These assessments are designed to identify potential risks, such as unintentional bias, misuse, or negative effects on specific communities. Our approach involves engaging a diverse range of stakeholders, including community representatives, organizational leaders, and technical experts, to ensure a holistic evaluation of the AI system's impact. By leveraging established frameworks such as the Ethics Guidelines for Trustworthy AI, we systematically assess the AI system's alignment with fairness, inclusivity, and societal benefit. Regular intervals for reassessment are scheduled to ensure the AI system adapts to evolving societal norms and organizational needs.

To address findings from ethical impact assessments, we establish a structured framework for implementing corrective actions. This framework prioritizes transparency by documenting identified issues, their potential impact, and recommended resolutions. Corrective measures may include retraining models with more representative datasets, refining algorithms to mitigate bias, or updating policies to address new ethical concerns. A dedicated task force oversees the implementation of these actions and monitors their effectiveness. Stakeholder feedback is solicited to validate the improvements and ensure ongoing alignment with ethical standards. By embedding this iterative approach into the AI lifecycle, Genesis Consulting Partners ensures that the organization's AI systems remain socially responsible and operationally effective.

5.4 Deliverables

Genesis outputs work products and deliverables depending on the specific scope, timeline and nature of each project. As part of our project approach, we detail our deliverables out as part of our proposal response, quote response, and or statement of work document. This input will then become part of the Member Purchase Order, along with the project timeline, scope, and other key components to govern the project delivery.

Table 2: Sample Deliverable Descriptions (Abbreviated)

Deliverable	Description
Initial AI Strategy Report	Reporting includes an assessment of the current capabilities, identifying areas where AI can provide the most value, such as operational efficiency, customer engagement, or predictive analytics. The report details recommended AI tools, frameworks, and technologies tailored to address specific challenges and align with strategic goals. It also includes a high-level data strategy, emphasizing data quality, governance, and privacy considerations, along with an evaluation of compliance requirements. Additionally, the report provides a preliminary roadmap for implementation, highlighting governance structures, timelines, potential risks, and resource requirements, setting the stage for a successful AI adoption journey.
Feasibility Study with AI Use Case Recommendations, including a detailed data strategy component.	Details the practicality and impact of adopting AI within an organization, focusing on actionable opportunities and tailored solutions. Identifies and prioritizes specific AI use cases based on potential to address organizational challenges, drive efficiency, and align with strategic objectives. Includes a detailed analysis of technical, operational, and financial feasibility, weighing factors such as available infrastructure, workforce readiness, and anticipated ROI. The study includes a detailed data strategy, outlining requirements for data collection, storage, quality assurance, and governance. This strategy emphasizes the importance of data integrity, privacy, and security while defining protocols for managing data sources, ensuring compliance with regulations, and enabling scalable AI implementations.
5-Year Business Process Design Document (BPD) and Roadmap	Multifaced document containing mapping the As-Is state to the To-Be state to include process design, master data, security, integration points, etc. Including: <ul style="list-style-type: none"> • Blueprints for PM • Operations integration process • Third-party software processes • Blueprints of the proposed changes to our systems and processes to include required reports for Concur reporting. • Sign off from stakeholders of proposed changes. • Implementation mapping and high-level schedule

Deliverable	Description
Pilot Implementation Plan	Solution architecture, key capability (design point) and critical success factors to address business challenges, roadmap direction. This also includes a segment of the plan outlining the AI technologies to be used, integration strategies, and timelines for deployment.
Staff Training Sessions and Knowledge Transfer Plan & Materials	<p>Outlines the organizational change management and training development, delivery approach as well as training schedule. This also includes our Knowledge Transfer (KT) Plan and the delivery schedule of KT materials.</p> <p>Training end-users as per the Training Plan & Schedule. Live Agent Training for AP & Expense Processors, Functional Administrators, and IT Support. Computer Based Training (CBT) for AP Processors, Functional Administrators, and IT Support</p>
Final Project Report, Including Project evaluation, outcomes, and recommendations for further AI integration.	The Final Project Report serves as a comprehensive summary of the AI project, capturing its evaluation, outcomes, and strategic recommendations for future AI integration. It begins with an overview of the project's objectives and scope, followed by an evaluation of the implementation process, highlighting successes, challenges, and lessons learned. The report presents measurable outcomes, such as improvements in efficiency, cost savings, or enhanced decision-making capabilities, supported by key performance metrics. Additionally, it provides actionable recommendations for further AI integration, identifying new opportunities, scaling strategies, and enhancements to existing systems

6 REQUIRED ATTACHMENTS

Genesis has provided a copy of all required attachments following this page, starting with the Required Attachment Checklist and ending with Exhibit 1.

Each attachment has been provided in the order presented in the RFP with the exception of the Certificate of Offeror and Cover Page Form, which has been included at the front of this document, in accordance with RFP instructions.

The remainder of this page has been intentionally left blank.

REQUIRED ATTACHMENT CHECKLIST

Please utilize this checklist to ensure that all required attachments are included with your proposal. IF AN ATTACHMENT DOES NOT APPLY, PLEASE MARK AS “**NOT APPLICABLE**” AND SUBMIT WITH THE PROPOSAL. FAILURE TO SUBMIT **ALL REQUIRED DOCUMENTS** MAY NEGATIVELY IMPACT YOUR EVALUATION SCORE.

- ☐ Page 1 - Cover Sheet
- ☐ Page 20 - Attachment I: Instructions for Proposals Compliance and Submittal
- ☐ Page 21 - Attachment II: Certification of Offeror
- ☐ Page 22 - Attachment III: Certification Regarding Debarment
- ☐ Page 23 - Attachment IV: Restrictions on Lobbying
- ☐ Page 25 - Attachment V: Drug-Free Workplace Certification
- ☐ Page 26 - Attachment VI: Certification Regarding Disclosure of Conflict of Interest
- ☐ Page 29 - Attachment VII: Certification of Fair Business Practices
- ☐ Page 30 - Attachment VIII: Certification of Good Standing Texas Corporate Franchise Tax Certification
- ☐ Page 31 - Attachment IX: Historically Underutilized Businesses
- ☐ Page 32 - Attachment X: Federal and State of Texas Required Procurement Provisions
- ☐ Page 35 - Exhibit 1: Service Designation Areas

Respondent recognizes that all proposals must be submitted electronically through [Public Purchase](#) by the RFP due date and time. All other forms of submissions will be deemed nonresponsive and will not be opened or considered.

**ATTACHMENT I: INSTRUCTIONS
FOR PROPOSALS COMPLIANCE AND SUBMITTAL**

Compliance with the Solicitation

Submissions must be in strict compliance with this solicitation. Failure to comply with all provisions of the solicitation may result in disqualification.

Compliance with the NCTCOG Standard Terms and Conditions

By signing its submission, Offeror acknowledges that it has read, understands and agrees to comply with the NCTCOG standard terms and conditions.

Acknowledgment of Insurance Requirements

By signing its submission, Offeror acknowledges that it has read and understands the insurance requirements for the submission. Offeror also understands that the evidence of required insurance must be submitted within ten (10) working days following notification of its offer being accepted; otherwise, NCTCOG may rescind its acceptance of the Offeror's proposals. The insurance requirements are outlined in Section 2.2 - General Terms and Conditions.

Name of Organization/Contractor(s):

Genesis Consulting Partners, LLC

Signature of Authorized Representative:

J.D. Weiman

Digitally signed by J.D. Weiman
Date: 2025.01.06 13:41:48 -05'00'

Date: **01/06/2025**

ATTACHMENT II: CERTIFICATIONS OF OFFEROR

I hereby certify that the information contained in this proposal and any attachments is true and correct and may be viewed as an accurate representation of proposed services to be provided by this organization. I certify that no employee, board member, or agent of the North Central Texas Council of Governments has assisted in the preparation of this proposal. I acknowledge that I have read and understand the requirements and provisions of the solicitation and that the organization will comply with the regulations and other applicable local, state, and federal regulations and directives in the implementation of this contract.


I also certify that I have read and understood all sections of this solicitation and will comply with all the terms and conditions as stated; and furthermore that I, Jacob Weiman (typed or printed name) certify that I am the Director of Contracts and Procurement (title) of the corporation, partnership, or sole proprietorship, or other eligible entity named as offeror and respondent herein and that I am legally authorized to sign this offer and to submit it to the North Central Texas Council of Governments, on behalf of said offeror by authority of its governing body.

Name of Organization/Contractor(s):

Genesis Consulting Partners, LLC

Signature of Authorized Representative:

J.D. Weiman

 Digitally signed by J.D. Weiman
Date: 2025.01.08 10:05:34 -0500'

Date: 01/08/2025

**ATTACHMENT III: CERTIFICATION
REGARDING DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITY MATTERS**

This certification is required by the Federal Regulations Implementing Executive Order 12549, Debarment and Suspension, 45 CFR Part 93, Government-wide Debarment and Suspension, for the Department of Agriculture (7 CFR Part 3017), Department of Labor (29 CFR Part 98), Department of Education (34 CFR Parts 85, 668, 682), Department of Health and Human Services (45 CFR Part 76).

The undersigned certifies, to the best of his or her knowledge and belief, that both it and its principals:

1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency;
2. Have not within a three-year period preceding this contract been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or Local) transaction or contract under a public transaction, violation of federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification, or destruction of records, making false Proposals, or receiving stolen property;
3. Are not presently indicated for or otherwise criminally or civilly charged by a government entity with commission of any of the offense enumerated in Paragraph (2) of this certification; and,
4. Have not within a three-year period preceding this contract had one or more public transactions terminated for cause or default.

Where the prospective recipient of federal assistance funds is unable to certify to any of the qualifications in this certification, such prospective recipient shall attach an explanation to this certification form.

Name of Organization/Contractor(s):

Genesis Consulting Partners, LLC

Signature of Authorized Representative:

J.D. Weiman

Digitally signed by J.D. Weiman
Date: 2025.01.08 10:10:34 -05'00'

Date: **01/08/2025**

ATTACHMENT IV: RESTRICTIONS ON LOBBYING

Section 319 of Public Law 101-121 prohibits recipients of federal contracts, grants, and loans exceeding \$100,000 at any tier under a federal contract from using appropriated funds for lobbying the Executive or Legislative Branches of the federal government in connection with a specific contract, grant, or loan. Section 319 also requires each person who requests or receives a federal contract or grant in excess of \$100,000 to disclose lobbying.

No appropriated funds may be expended by the recipient of a federal contract, loan, or cooperative agreement to pay any person for influencing or attempting to influence an officer or employee of any federal executive department or agency as well as any independent regulatory commission or government corporation, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with any of the following covered federal actions: the awarding of any federal contract, the making of any federal grant, the making of any federal loan the entering into of any cooperative agreement and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.

As a recipient of a federal grant exceeding \$100,000, NCTCOG requires its subcontractors of that grant to file a certification, set forth in Appendix B.1, that neither the agency nor its employees have made, or will make, any payment prohibited by the preceding paragraph.

Subcontractors are also required to file with NCTCOG a disclosure form, set forth in Appendix B.2, if the subcontractor or its employees have made or have agreed to make any payment using nonappropriated funds (to include profits from any federal action), which would be prohibited if paid for with appropriated funds.

**LOBBYING CERTIFICATION
FOR CONTRACTS, GRANTS, LOANS, AND COOPERATIVE AGREEMENTS**

The undersigned certifies, to the best of his or her knowledge or belief, that:

1. No federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an officer or employee of a Member of Congress in connection with the awarding of any federal contract, the making of any federal loan, the entering into of any cooperative Contract, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative contract; and
2. If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this federal contract, grant, loan, and or cooperative contract, the undersigned shall complete and submit Standard Form – LLL, “Disclosure Form to Report Lobbying”, in accordance with the instructions.
3. The undersigned shall require that the language of this certification be included in the award documents for all sub-awards at all tiers and that all sub-recipients shall certify accordingly.

Name of Organization/Contractor(s):

Genesis Consulting Partners, LLC

Signature of Authorized Representative:

J.D. Weiman

Digitally signed by J.D. Weiman
Date: 2025.01.08 12:14:03 -05'00'

Date: **01/08/2025**

ATTACHMENT V: DRUG-FREE WORKPLACE CERTIFICATION

The Genesis Consulting Partners, LLC (company name) will provide a Drug Free Work Place in compliance with the Drug Free Work Place Act of 1988. The unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited on the premises of the Genesis Consulting Partners, LLC (company name) or any of its facilities. Any employee who violates this prohibition will be subject to disciplinary action up to and including termination. All employees, as a condition of employment, will comply with this policy.

CERTIFICATION REGARDING DRUG-FREE WORKPLACE

This certification is required by the Federal Regulations Implementing Sections 5151-5160 of the Drug-Free Workplace Act, 41 U.S.C. 701, for the Department of Agriculture (7 CFR Part 3017), Department of Labor (29 CFR Part 98), Department of Education (34 CFR Parts 85, 668 and 682), Department of Health and Human Services (45 CFR Part 76).

The undersigned subcontractor certifies it will provide a drug-free workplace by:

Publishing a policy Proposal notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace and specifying the consequences of any such action by an employee;

Establishing an ongoing drug-free awareness program to inform employees of the dangers of drug abuse in the workplace, the subcontractor's policy of maintaining a drug-free workplace, the availability of counseling, rehabilitation and employee assistance programs, and the penalties that may be imposed on employees for drug violations in the workplace;

Providing each employee with a copy of the subcontractor's policy Proposal;

Notifying the employees in the subcontractor's policy Proposal that as a condition of employment under this subcontract, employees shall abide by the terms of the policy Proposal and notifying the subcontractor in writing within five days after any conviction for a violation by the employee of a criminal drug abuse statute in the workplace;

Notifying the Board within ten (10) days of the subcontractor's receipt of a notice of a conviction of any employee; and,

Taking appropriate personnel action against an employee convicted of violating a criminal drug statute or requires such employee to participate in a drug abuse assistance or rehabilitation program.

Name of Organization/Contractor(s):

Genesis Consulting Partners, LLC

Signature of Authorized Representative:

J.D. Weiman

Digitally signed by J.D. Weiman
Date: 2025.01.08 12:16:29 -0500

Date: 01/08/2024

**ATTACHMENT VI: DISCLOSURE OF CONFLICT OF INTEREST
CERTIFICATION REGARDING DISCLOSURE OF CONFLICT OF INTEREST**

The undersigned certifies that, to the best of his or her knowledge or belief, that:

“No employee of the contractor, no member of the contractor’s governing board or body, and no person who exercises any functions or responsibilities in the review or approval of the undertaking or carrying out of this contract shall participate in any decision relating to this contract which affects his/her personal pecuniary interest.

Executives and employees of contractor shall be particularly aware of the varying degrees of influence that can be exerted by personal friends and associates and, in administering the contract, shall exercise due diligence to avoid situations which give rise to an assertion that favorable treatment is being granted to friends and associates. When it is in the public interest for the contractor to conduct business with a friend or associate of an executive or employee of the contractor, an elected official in the area or a member of the North Central Texas Council of Governments, a permanent record of the transaction shall be retained.

Any executive or employee of the contractor, an elected official in the area or a member of the NCTCOG, shall not solicit or accept money or any other consideration from a third person, for the performance of an act reimbursed in whole or part by contractor or Department. Supplies, tools, materials, equipment or services purchased with contract funds shall be used solely for purposes allowed under this contract. No member of the NCTCOG shall cast a vote on the provision of services by that member (or any organization which that member represents) or vote on any matter which would provide a direct or indirect financial benefit to the member or any business or organization which the member directly represents”.

No officer, employee or paid consultant of the contractor is a member of the NCTCOG.

No officer, manager or paid consultant of the contractor is married to a member of the NCTCOG.

No member of NCTCOG directly owns, controls or has interest in the contractor.

The contractor has disclosed any interest, fact, or circumstance that does or may present a potential conflict of interest.

No member of the NCTCOG receives compensation from the contractor for lobbying activities as defined in Chapter 305 of the Texas Government Code.

Should the contractor fail to abide by the foregoing covenants and affirmations regarding conflict of interest, the contractor shall not be entitled to the recovery of any costs or expenses incurred in relation to the contract and shall immediately refund to the North Central Texas Council of Governments any fees or expenses that may have been paid under this contract and shall further be liable for any other costs incurred or damages sustained by the NCTCOG as it relates to this contract.

Name of Organization/Contractor(s):

Genesis Consulting Partners, LLC

Signature of Authorized Representative:

J.D. Weiman

Digitally signed by J.D. Weiman
Date: 2025.01.08 16:41:01 -05'00'

Date: **01/08/2025**

ATTACHMENT VII: CERTIFICATION OF FAIR BUSINESS PRACTICES


That the submitter has not been found guilty of unfair business practices in a judicial or state agency administrative proceeding during the preceding year. The submitter further affirms that no officer of the submitter has served as an officer of any company found guilty of unfair business practices in a judicial or state agency administrative during the preceding year.

Name of Organization/Contractor(s):

Genesis Consulting Partners, LLC

Signature of Authorized Representative:

J.D. Weiman

 Digitally signed by J.D. Weiman
Date: 2025.01.08 16:44:25 -05'00'

Date: **01/08/2025**

**ATTACHMENT VIII: CERTIFICATION OF GOOD STANDING
TEXAS CORPORATE FRANCHISE TAX CERTIFICATION**

Pursuant to Article 2.45, Texas Business Corporation Act, state agencies may not contract with for profit corporations that are delinquent in making state franchise tax payments. The following certification that the corporation entering into this offer is current in its franchise taxes must be signed by the individual authorized on Form 2031, Corporate Board of Directors Resolution, to sign the contract for the corporation.

The undersigned authorized representative of the corporation making the offer herein certified that the following indicated Proposal is true and correct and that the undersigned understands that making a false Proposal is a material breach of contract and is grounds for contract cancellation.

Indicate the certification that applies to your corporation:



The Corporation is a for-profit corporation and certifies that it is not delinquent in its franchise tax payments to the State of Texas.



The Corporation is a non-profit corporation or is otherwise not subject to payment of franchise taxes to the State of Texas.

Type of Business (if not corporation):



Sole Proprietor



Partnership



Other

Pursuant to Article 2.45, Texas Business Corporation Act, the North Central Texas Council of Governments reserves the right to request information regarding state franchise tax payments.

Jacob D. Weiman

(Printed/Typed Name and Title of Authorized Representative)

J.D. Weiman

Signature

Date: **J.D. Weiman**

Digitally signed by J.D.
Weiman
Date: 2025.01.08 16:46:37
-05'00'

**ATTACHMENT IX: HISTORICALLY UNDERUTILIZED BUSINESSES,
MINORITY OR WOMEN-OWNED OR DISADVANTAGED BUSINESS ENTERPRISES**

Historically Underutilized Businesses (HUBs), minority or women-owned or disadvantaged businesses enterprises (M/W/DBE) are encouraged to participate in the solicitation process.

NCTCOG recognizes the certifications of most agencies. HUB vendors must submit a copy of their certification for consideration during the evaluation of their proposal. Please attach the copy to this form. This applies only to the Offeror and not a subcontractor.

Texas vendors who are not currently certified are encouraged to contact either the Texas United Certification Program, State of Texas HUB Program, or the North Central Texas Regional Certification Agency, among others. Contact:

State of Texas HUB Program
Texas Comptroller of Public Accounts
Lyndon B. Johnson State Office Building
111 East 17th Street
Austin, Texas 78774
(512) 463-6958
<http://www.window.state.tx.us/procurement/prog/hub/>

North Central Texas Regional Certification Agency
624 Six Flags Drive, Suite 100
Arlington, TX 76011
(817) 640-0606
<http://www.nctrca.org/certification.html>

Texas United Certification Program
USDOT website at
<https://www.transportation.gov/DBE>

You must include a copy of your certification document as part of this solicitation to receive points in the evaluation.

Vendor to Sign Below to Attest to Validity of Certification:

Genesis Consulting Partners, LLC

Vendor Name

J.D. Weiman Digitally signed by J.D. Weiman
Date: 2025.01.08 16:51:00 -05'00'

Authorized Signature

Jacob D. Weiman

Typed Name

01/08/2025

Date

☒ Not applicable.

**ATTACHMENT X: NCTCOG FEDERAL AND STATE OF TEXAS
REQUIRED PROCUREMENT PROVISIONS**

The following provisions are mandated by Federal and/or State of Texas law. Failure to certify to the following will result in disqualification of consideration for contract. Entities or agencies that are not able to comply with the following will be ineligible for consideration of contract award.

**PROHIBITED TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT
CERTIFICATION**

This Contract is subject to the Public Law 115-232, Section 889, and 2 Code of Federal Regulations (CFR) Part 200, including §200.216 and §200.471, for prohibition on certain telecommunications and video surveillance or equipment. Public Law 115-232, Section 889, identifies that restricted telecommunications and video surveillance equipment or services (e.g., phones, internet, video surveillance, cloud servers) include the following:

- A) Telecommunications equipment that is produced by Huawei Technologies Company or ZTE Corporation (or any subsidiary or affiliates of such entities).
- B) Video surveillance and telecommunications equipment produced by Hytera Communications Corporations, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company (or any subsidiary or affiliates of such entities).
- C) Telecommunications or video surveillance services used by such entities or using such equipment.
- D) Telecommunications or video surveillance equipment or services produced or provided by an entity that the Secretary of Defense, Director of the National Intelligence, or the Director of the Federal Bureau of Investigation reasonably believes to be an entity owned or controlled by the government of a covered foreign country. The entity identified below, through its authorized representative, hereby certifies that no funds under this Contract will be obligated or expended to procure or obtain telecommunication or video surveillance services or equipment or systems that use covered telecommunications equipment or services as a substantial or essential component of any system, or as a critical technology as part of any system prohibited by 2 CFR §200.216 and §200.471, or applicable provisions in Public Law 115-232 Section 889.

☒ The Contractor or Subrecipient hereby certifies that it does comply with the requirements of 2 CFR §200.216 and §200.471, or applicable regulations in Public Law 115-232 Section 889.

SIGNATURE OF AUTHORIZED PERSON:	J.D. Weiman	<small>Digitally signed by J.D. Weiman Date: 2025.01.08 17:02:07 -05'00'</small>
NAME OF AUTHORIZED PERSON:	Jacob D. Weiman	
NAME OF COMPANY:	Genesis Consulting Partners, LLC	
DATE:	01/08/2025	

-OR-

☐ The Contractor or Subrecipient hereby certifies that it cannot comply with the requirements of 2 CFR §200.216 and §200.471, or applicable regulations in Public Law 115-232 Section 889.

SIGNATURE OF AUTHORIZED PERSON:	_____
NAME OF AUTHORIZED PERSON:	_____
NAME OF COMPANY:	_____
DATE:	_____

DISCRIMINATION AGAINST FIREARMS ENTITIES OR FIREARMS TRADE ASSOCIATIONS

This contract is subject to the Texas Local Government Code chapter 2274, Subtitle F, Title 10, prohibiting contracts with companies who discriminate against firearm and ammunition industries.

TLGC chapter 2274, Subtitle F, Title 10, identifies that “discrimination against a firearm entity or firearm trade association” includes the following:

- A) means, with respect to the entity or association, to:
- I. refuse to engage in the trade of any goods or services with the entity or association based solely on its status as a firearm entity or firearm trade association; and
 - II. refrain from continuing an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association; or
 - III. terminate an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association.
- B) An exception to this provision excludes the following:
- I. contracts with a sole-source provider; or
 - II. the government entity does not receive bids from companies who can provide written verification.

The entity identified below, through its authorized representative, hereby certifies that they have no practice, policy, guidance, or directive that discriminates against a firearm entity or firearm trade association; and that they will not discriminate during the term of the contract against a firearm entity or firearm trade association as prohibited by Chapter 2274, Subtitle F, Title 10 of the Texas Local Government Code.

☐ The Contractor or Subrecipient hereby certifies that it does comply with the requirements of Chapter 2274, Subtitle F, Title 10.

**SIGNATURE OF AUTHORIZED
PERSON:**

J.D. Weiman

Digitally signed by J.D. Weiman
Date: 2025.01.08 17:04:08 -05'00'

NAME OF AUTHORIZED PERSON:

Jacob D. Weiman

NAME OF COMPANY:

Genesis Consulting Partners, LLC

DATE:

1/8/25

-OR-

☐ The Contractor or Subrecipient hereby certifies that it cannot comply with the requirements of Chapter 2274, Subtitle F, Title 10.

**SIGNATURE OF AUTHORIZED
PERSON:**

NAME OF AUTHORIZED PERSON:

NAME OF COMPANY:

DATE:

BOYCOTTING OF CERTAIN ENERGY COMPANIES

This contract is subject to the Texas Local Government Code chapter 809, Subtitle A, Title 8, prohibiting contracts with companies who boycott certain energy companies.

TLGC chapter Code chapter 809, Subtitle A, Title 8, identifies that “boycott energy company” means, without an ordinary business purpose, refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations with a company because the company:

- I. engages in the exploration, production, utilization, transportation, sale, or manufacturing of fossil fuel-based energy and does not commit or pledge to meet environmental standards beyond applicable federal and state law; and
- II. does business with a company described by paragraph (I).

The entity identified below, through its authorized representative, hereby certifies that they do not boycott energy companies, and that they will not boycott energy companies during the term of the contract as prohibited by Chapter 809, Subtitle A, Title 8 of the Texas Local Government Code.

☒ The Contractor or Subrecipient hereby certifies that it does comply with the requirements of Chapter 809, Subtitle A, Title 8.

SIGNATURE OF AUTHORIZED PERSON: **J.D. Weiman** Digitally signed by J.D. Weiman
Date: 2025.01.08 17:06:13 -05'00'

NAME OF AUTHORIZED PERSON:

Jacob D. Weiman

NAME OF COMPANY:

Genesis Consulting Partners, LLC

DATE:

1/8/25

-OR-

☐ The Contractor or Subrecipient hereby certifies that it cannot comply with the requirements of Chapter 809, Subtitle A, Title 8.

SIGNATURE OF AUTHORIZED PERSON:

NAME OF AUTHORIZED PERSON:

NAME OF COMPANY:

DATE:

EXHIBIT 1: SERVICE DESIGNATION AREAS

Texas Service Area Designation or Identification			
Proposing Firm Name:			
Notes:	Indicate in the appropriate box whether you are proposing to service the entire state of Texas		
	Will service the entire state of Texas	Will not service the entire state of Texas	
	If you are not proposing to service the entire state of Texas, designate on the form below the regions that you are proposing to provide goods and/or services to. By designating a region or regions, you are certifying that you are willing and able to provide the proposed goods and services.		
Item	Region	Metropolitan Statistical Areas	Designated Service Area
1.	North Central Texas	16 counties in the Dallas-Fort Worth Metropolitan area	
2.	High Plains	Amarillo Lubbock	
3.	Northwest	Abilene Wichita Falls	
4.	Upper East	Longview Texarkana, TX-AR Metro Area Tyler	
5.	Southeast	Beaumont-Port Arthur	
6.	Gulf Coast	Houston-The Woodlands-Sugar Land	
7.	Central Texas	College Station-Bryan Killeen-Temple Waco	
8.	Capital Texas	Austin-Round Rock	
9.	Alamo	San Antonio-New Braunfels Victoria	
10.	South Texas	Brownsville-Harlingen Corpus Christi Laredo McAllen-Edinburg-Mission	
11.	West Texas	Midland Odessa San Angelo	
12.	Upper Rio Grande	El Paso	

(Exhibit 1 continued on next page)

Nationwide Service Area Designation or Identification Form							
Proposing Firm Name:							
Notes:	<p>Indicate in the appropriate box whether you are proposing to provide service to all Fifty (50) States.</p> <table border="1"> <tr> <td>Will service all fifty (50) states</td> <td>Will not service fifty (50) states</td> </tr> <tr> <td></td> <td></td> </tr> </table> <p>If you are not proposing to service to all fifty (50) states, then designate on the form below the states that you will provide service to. By designating a state or states, you are certifying that you are willing and able to provide the proposed goods and services in those states.</p> <p>If you are only proposing to service a specific region, metropolitan statistical area (MSA), or City in a State, then indicate as such in the appropriate column box.</p>			Will service all fifty (50) states	Will not service fifty (50) states		
Will service all fifty (50) states	Will not service fifty (50) states						
Item	State	Region/MSA/City (write "ALL" if proposing to service entire state)	Designated as a Service Area				
1.	Alabama						
2.	Alaska						
3.	Arizona						
4.	Arkansas						
5.	California						
6.	Colorado						
7.	Connecticut						
8.	Delaware						
9.	Florida						
10.	Georgia						
11.	Hawaii						
12.	Idaho						
13.	Illinois						
14.	Indiana						
15.	Iowa						
16.	Kansas						
17.	Kentucky						
18.	Louisiana						
19.	Maine						
20.	Maryland						

21.	Massachusetts		
22.	Michigan		
23.	Minnesota		
24.	Mississippi		
25.	Missouri		
26.	Montana		
27.	Nebraska		
28.	Nevada		
29.	New Hampshire		
30.	New Jersey		
31.	New Mexico		
32.	New York		
33.	North Carolina		
34.	North Dakota		
35.	Ohio		
36.	Oregon		
37.	Oklahoma		
38.	Pennsylvania		
39.	Rhode Island		
40.	South Carolina		
41.	South Dakota		
42.	Tennessee		
43.	Texas		
44.	Utah		
45.	Vermont		
46.	Virginia		
47.	Washington		
48.	West Virginia		
49.	Wisconsin		
50.	Wyoming		

End of Exhibit 1