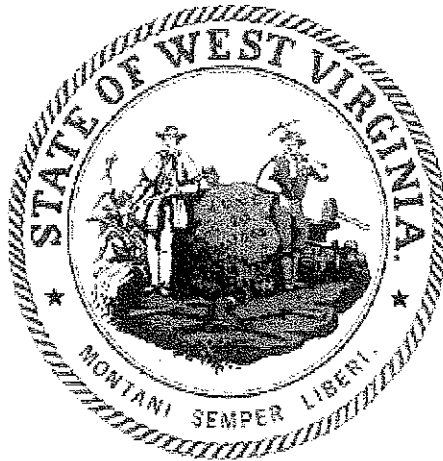


ORIGINAL



BDMP Proposal to Provide
Software Engineering Services for ERP

In response to EOI FAR106065

January 6, 2010

Submitted by:

Timothy Masse, MBA, Principal
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STATE OF WEST VIRGINIA
DIVISION OF PURCHASING

BERRY, DUNN, MCNEIL & PARKER

BIDMP

CERTIFIED PUBLIC ACCOUNTANTS
MANAGEMENT CONSULTANTS



January 6, 2010

Ms. Krista Ferrell
Buyer Supervisor
Purchasing Division
P.O. Box 50130
Charleston, WV 25305-0130

Dear Ms. Ferrell:

Berry, Dunn, McNeil & Parker (BDMP) is pleased to submit this proposal to the State of West Virginia in response to Expression of Interest (EOI) No. FAR106065: Software Engineering Services for ERP. We have read the EOI, we understand it, and we agree to the terms and conditions stated therein.

BDMP is an independent consulting and Certified Public Accounting firm headquartered in Maine and serving clients nationally. The following points highlight the strengths of our qualifications to assist the State with this ERP replacement initiative:

- *Demonstrated Experience* – We have worked with government agencies across the country on all aspects of ERP system planning, procurement, and implementation projects – including states that are similar in size to West Virginia – and are knowledgeable about the strengths and best practices associated with government ERP systems. We are proud of the success of our ERP consulting engagements and our clients' satisfaction with BDMP's services.
- *Knowledge of West Virginia State Government* – We have been working with the State of West Virginia since 2003 and are very familiar with the culture, technology, and IT standards within the State. We have been selected repeatedly to conduct similar projects for the State, including systems planning, procurement, project management, quality assurance oversight, and IT security evaluations, which speaks to the State's satisfaction with BDMP's services.
- *Understanding of ERP Systems and Business Processes* – We offer the State a unique set of qualifications in that two of our team members were formerly employed by ERP system vendors and implemented ERP solutions for government agencies across the Country. In addition to our hands-on ERP system experience, as a Certified Public Accounting and consulting firm, we are able to draw on our firm's accounting resources to address complex financial, accounting, and regulatory challenges that routinely arise during ERP system replacement initiatives.

Ms. Krista Ferrell

January 6, 2010

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- *Established Project Management Practices* – Our team has hands-on experience managing ERP system projects the size and complexity of West Virginia's ERP replacement initiative. Our project management approach is derived from established and proven project management methodologies as defined by the Project Management Institute (PMI). Two members of our team are certified Project Management Professionals, with demonstrated experience guiding states through complex system replacement initiatives of this nature.
- *A Focus on Quality* – Our work is guided by quality management standards that define expectations up front. We build quality assurance checks into all of our work rather than tacking on a cursory quality assurance check at the end. By incorporating quality management into our day-to-day work, we will reduce risk and actualize outcomes in line with expectations – a guiding principle of BDMP's approach.
- *Independence and Objectivity* – BDMP is an independent consulting firm. We do not sell, develop, or implement software or hardware, nor do we have relationships with vendors that could impair our independence. If selected to conduct this project, we will provide services and recommendations that are only in the best interest of the State.

BDMP is a stable and well-established firm. We have been able to preserve our core values and reputation for excellence for 36 years and we have enjoyed steady growth by providing consistent, high-quality services to our clients. Our stability gives our clients confidence when engaging us to help them conduct engagements of significant scope and duration. We are proud of the work we have accomplished in West Virginia over the past seven years and would enjoy the opportunity to build on that relationship through this ERP system replacement initiative.

Enclosed are one (1) original and ten (10) CDs of our proposal for the Evaluation Committee's review. Our proposal shall remain valid for a minimum of 180 days from the proposal due date of January 6, 2010. We would enjoy the opportunity to work with the State on this project and would be pleased to present our proposal to answer any questions the Evaluation Committee may have.

Sincerely,



Timothy F. Masse

Principal



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PROPOSAL REQUIREMENTS MATRIX

The purpose of this section of our response is to acknowledge requirements outlined in the State's EOI regarding the format, content, and submission of our proposal. We believe we have complied with all response requirements outlined in the State's EOI. The following table identifies the local in our proposal where we have addressed specific EOI requirements.

Requirement	Requirement Location	BDMP Complies	Response Section	Response Page
Submit one (1) original and ten (10) CDs to the Purchasing Division	Section 1.9	Yes	BDMP Response	BDMP Response
Describe the form of business (i.e., individual, sole proprietor, corporation, non-profit corporation, partnership, Limited Liability Company) and detail the name, mailing address, telephone number and e-mail address of the contact person representing the firm and who will be the designated contact person.	Section 3.7.1.a	Yes	1. General	6
Provide a statement of whether there have been any mergers, acquisitions, or sales of the company within the last ten (10) years. If so, include an explanation/information providing relevant details.	Section 3.7.1.b	Yes	1. General	6
Provide a statement of whether there is any pending litigation against the firm and status of claims.	Section 3.7.1.c	Yes	1. General	6
Provide a statement of whether the firm has filed (or had filed against it) any bankruptcy or insolvency proceeding, whether voluntary or involuntary, or undergone the appointment of a receiver, trustee, or assignee for the benefit of creditors during the last ten (10) year period including the current status.	Section 3.7.1.d	Yes	1. General	6
Provide a narrative that illustrates the firm's understanding of the State's requirements.	Section 3.7.1.e	Yes	1. General	7
Provide a narrative that explains and illustrates the firm's concepts for this project as referenced in section 3.5.	Section 3.7.1.f	Yes	1. General	8-17



Requirement	Requirement Location	BDMP Complies	Response Section	Response Page
Describe any significant problems encountered by the firm in other ERP system projects, explain issues and problem resolution and how those problems may be avoided in this project.	Section 3.7.1.g	Yes	1. General	18-22
Describe your firm’s approach and methodology for retaining a stable consulting staff throughout the contract duration for this project. Include processes currently in place for motivating staff and ensuring technical competence in a changing technological environment.	Section 3.7.1.h	Yes	1. General	22-23
Disclose any legal or organizational relationships your company has with consultants of ERP software. Describe the nature of the relationship. Also, identify any business partner or alliance relationships you have with consultants of ERP software. Describe the nature of the partnership or alliance.	Section 3.7.1.i	Yes	1. General	23
Disclose any agreements or relationships with software or hardware consultants that may present a conflict of interest to your company and potentially affect your ability to objectively advise the State on hardware or software selection.	Section 3.7.1.j	Yes	1. General	23
Provide any information on any industry accepted best practices that your company has adopted or attained certifications in such as ISO 9001 or the Software Engineering Institute’s (SEI) Capability Maturity Model (CMM).	Section 3.7.1.k	Yes	1. General	23-25
Provide the firms most recent audited financial statement and DUNS number.	Section 3.7.1.l	Yes	1. General	26
Provide a list of subcontractors which may be utilized in this engagement.	Section 3.7.1.m	Yes	1. General	27
Describe how long the firm has been performing the services required by this Expression of Interest and include the	Section 3.7.2.a	Yes	2. Qualifications	28



Requirement	Requirement Location	BDMP Complies	Response Section	Response Page
number of years in business overall.				
Describe the firm's organizational structure include number of employees, client base, and location of offices.	Section 3.7.2.b	Yes	2. Qualifications	28-29
Provide a statement regarding the firm's ability to complete work associated with this Expression of Interest and whether the firm plans to subcontract work. If subcontracting is anticipated, please provide a list of services proposed for subcontracting.	Section 3.7.2.c	Yes	2. Qualifications	30
Describe the Consultant's experience in assisting governments in the development of the solicitation document, preparation of responses to inquiries during the bid process, assisting in the evaluation of solicitation responses, assisting in conducting interviews and ERP system demonstrations, and assisting in negotiating a contract with the selected ERP vendor.	Section 3.7.3.a	Yes	3. Experience	31-32
Describe the Consultant's experience with multiple ERP software systems and multiple software implementers in government applications.	Section 3.7.3.b	Yes	3. Experience	32-34
Describe experience with making decisions about hosting software, including risks, benefits, and cost analysis.	Section 3.7.3.c	Yes	3. Experience	34
Provide a list of all government-related ERP projects completed by the firm. Address how the experience gained (successes and failures) from these engagements can be applied to the Requirements Definition phase of the West Virginia ERP project.	Section 3.7.3.d	Yes	3. Experience	35-41
Provide a list of employees proposed for this project including employee name, title, and time with the firm, education, employment history, and detail for specific ERP experience.	Section 3.7.3.e	Yes	3. Experience	42-47 and 53-59



Requirement	Requirement Location	BDMP Complies	Response Section	Response Page
Provide no less than 3 but more than 5 references for similar projects completed by the firm. Include the business name, description of services provided, project dates, contact name, address, and phone number, e-mail address, length of contract, and total amount.	Section 3.7.3.f	Yes	3. Experience	47-52
Provide a signed copy of the EOI Cover Pages, Addendum No. 1, and Purchasing Affidavit	Addendum 1	Yes	Appendix A	60+



1. GENERAL (RFP SECTION 3.7.1)

a. Describe the form of business (i.e., individual, sole proprietor, corporation, non-profit corporation, partnership, Limited Liability Company) and detail the name, mailing address, telephone number, and e-mail address of the contact person representing the firm and who will be the designated contact person.

Berry, Dunn, McNeil & Parker (BDMP) is a Limited Liability Company formed in the State of Maine. The following individual is a Principal of this firm and is legally authorized to commit BDMP to the work proposed herein. Should the State have questions regarding our proposal, you may contact Timothy Masse directly at:

Timothy F. Masse, Principal
Berry, Dunn, McNeil & Parker
100 Middle Street
Portland, Maine 04104
Telephone/Fax: (207) 541-2323
E-mail: tmasse@bdmp.com.

b. Provide a statement of whether there have been any mergers, acquisitions, or sales of the company within the last ten (10) years. If so, include an explanation/information providing relevant details.

BDMP was formed in 1974 under the name Berry, Dunn, & McNeil. We have been conducting business under the name Berry, Dunn, McNeil & Parker since 1983. Within the last ten years, BDMP has not merged with, been acquired by, or been sold to another firm. However, BDMP acquired The Westport Group in 2000, which expanded our healthcare consulting practice's expertise in serving the needs of rural health providers.

c. Provide a statement of whether there is any pending litigation against the firm and status of claims.

BDMP does not have any significant prior or pending civil or criminal litigation or investigation pending.

d. Provide a statement of whether the firm has filed (or had filed against it) any bankruptcy or insolvency proceeding, whether voluntary or involuntary, or undergone the appointment of a receiver, trustee, or assignee for the benefit of creditors during the last ten (10) years.

BDMP has not filed any bankruptcy or insolvency proceeding, nor have the firm had any bankruptcy proceeding filed against in, during the last ten (10) years.



e. Provide a narrative that illustrates the firm's understanding of the State's requirements.

The State of West Virginia is undertaking an ambitious and far-reaching initiative to replace its West Virginia Financial Information Management System (WVFIMS) with an integrated Enterprise Resource Planning (ERP) solution. The selected consulting firm will be independent of ERP software vendors and have a proven methodology for providing the ERP consulting services, as demonstrated through work with other government agencies.

WVFIMS is a custom-developed legacy system that has been the State's primary accounting system since 1994. In 2007, the State hired an independent consultant to evaluate the functionality of WVFIMS and determine the viability of this system in meeting the State's future business needs. As a result of the independent assessment and subsequent internal evaluations of WVFIMS, the State has determined the need to replace the existing system with a new, integrated ERP solution that encompasses Finance, Human Resources, Payroll, and Procurement functions.

A key objective of this system replacement initiative is to streamline business processes and operations through a single integrated database, thereby eliminating "silos" and data redundancies across multiple administrative areas and providing real-time access to data. In addition, the State will benefit from industry best practices supported by the selected solution.

The State is seeking the services of an independent ERP consulting firm to partner with and augment State personnel in conducting the following activities:

- Evaluating the State's ERP system needs;
- Developing a business case for the replacement of WVFIMS;
- Evaluating the State's readiness for implementing a new ERP solution;
- Developing technical and functional requirements;
- Preparing an ERP system solicitation document;
- Facilitating the procurement and vendor selection process;
- Providing contract negotiation support;
- Guiding business process improvement activities;
- Providing change management support; and
- Providing independent oversight of the system implementation.

At this stage, the State is seeking information from ERP consulting firms regarding their experience and approach to providing the above-listed ERP consulting services. Following the evaluation of proposals, the State will work with the preferred consulting firm to determine the specific scope of services to be provided and the associated cost of services.



f. Provide a narrative that explains and illustrates the firm's concepts for this project as referenced in section 3.5.

BDMP has developed an efficient, effective, and proven methodology for evaluating clients' ERP system needs, developing ERP system requirements, and guiding clients through a structured procurement, system selection, and implementation process. We believe that our proven methodologies and our successful experience working with states similar in size to West Virginia on similar projects – combined BDMP's seven-year history of working with the State of West Virginia and our understanding of the State's culture and IT standards – are key factors to the success of this ERP system replacement project.

Central to our approach is to include client stakeholders in defining system requirements and planning for the selection and implementation of a new system. We involve appropriate stakeholders when and as needed; work to ensure that participants understand the purpose of each meeting, their role, and how information gathered will be used; and provide an opportunity for participants to validate information to ensure it was captured correctly.

In order for this project to succeed, State Leadership must be supportive of the initiative and take an active role in key decision-making activities needed to guide the direction of this project. At the outset of the project, BDMP will work with the State to establish an effective organizational structure and Communication Plan that defines the role the State's Leadership Team will play in decision-making, establishes processes for escalating issues/risks, and sets forth the methods of communicating project status with Executive Leadership so that they are kept apprised of the project without over-burdening them in the day-to-day project activities.

Our approach for this project is comprised of six major project components, as summarized below and described in greater detail in this section of our response:

1. ERP Needs Assessment, Business Case Analysis, and Implementation Readiness
2. Requirements Definition and RFP Development
3. Procurement, Vendor Selection, and Contract Negotiation Assistance
4. Business Process Improvement
5. Change Management
6. Implementation Oversight

We strive to be flexible when it comes to development and execution of an effective project plan. We understand that no two projects are exactly alike and believe that one of the primary reasons we have been successful with similar client projects is our willingness to be flexible in adapting to the unique needs of our clients.

In the following sections, we have described our approach to providing the ERP consulting services sought by the State, as set forth in Sections 3.1 through 3.5 of the EOI.



ERP Needs Assessment, Business Case Analysis, and Implementation Readiness

We understand that one of the first key tasks the State has requested is undertaking an assessment of the “As-Is” operations and systems supporting the State’s Finance, Human Resources, Payroll, and Procurement functions. BDMP has developed an efficient, effective, and proven methodology for assessing ERP system needs. In our evaluation, we will consider the State’s current and future business and operating needs, assess your present systems and processes in light of these needs, and provide objective and independent findings to guide the State in evaluating alternative solutions.

Prior to beginning our work, we will first review the Needs Assessment conducted by Unisys in 2007, together with subsequent analyses conducted by the State regarding WVFIMS, to ensure that we are building on the work that has been conducted to date rather than replicating tasks. In addition, we will meet with State leaders to confirm the goals and objectives for this replacement initiative, as well as potential constraints that must be considered in evaluating alternatives.

We will then meet with stakeholders from each of the State’s functional areas to establish an “As-Is” baseline of the existing applications, business processes, and standards and gain an understanding of key challenges and issues that will need to be addressed as part of this project. In our analysis, we will evaluate the State’s current operations and systems in light of industry best practices and identify gaps between current operations and industry best practices. This information will be used to build a Business Case that describes the benefits and risks of alternative solutions (e.g., build versus buy, upgrade existing system, replace with best of breed solution, replace with a State-supported ERP solution, replace with a vendor-supported ERP solution). The Business Case will be used to guide the State in shaping the replacement initiative.

As part of the Business Case, we will provide a description of each viable replacement alternative and why we believe the solution is viable, the benefits and drawbacks (including risks) associated with each solution, and a description of the high-level steps the State will need to take should it choose to pursue that solution. The information will be factual and objective, in sufficient detail to allow the State to make an informed decision. The Business Case will rank viable solutions from the most desirable to least desirable, based on an objective assessment of our analysis, and include a summary of the reasons for our prioritization ranking.

A key component of the Business Case will be an assessment of the State’s readiness to implement the recommended solution(s), and its willingness and capability to embrace systematic and business process change. As part of our evaluation of implementation readiness across State agencies, we envision developing a web-based survey to reach a broad audience to gain information from stakeholders at all levels regarding such areas as technology competence, reluctance to change, willingness to adopt new business processes, etc.



Requirements Definition and RFP Development

BDMP offers a proven, iterative, and collaborative process for defining technical and functional system requirements that promotes involvement of stakeholders from all levels, which we have developed and refined over the past 20 years.

BDMP's custom-developed database of general ERP system technical and functional requirements serves as the foundation for the requirements definition process. Based on our understanding of the State's current business and technical environment, we will make refinements to our database with consideration given to those processes that are critical or unique to the State. In addition, we will consider those requirements not provided by the State's current systems that would offer opportunity for improved process functionality in the future environment. We have found that, in following this process, we are able to define approximately 75 percent of requirements up front for most government clients.

We will then schedule facilitated Joint Requirement Planning (JRP) work sessions with stakeholders from each of the business areas that require a list of functional requirements (e.g., Payroll, Procurement, Accounts Payable, Pension Management, Inventory Control, etc.). The purpose of these meetings will be to review the preliminary list of requirements and facilitate additions, changes, and deletions. During these facilitated work sessions, BDMP will work collaboratively with participants and challenge staff to consider "desired" or "required" needs in the future environment. We will also ask stakeholders to identify whether or not the requirements exist in today's environment.

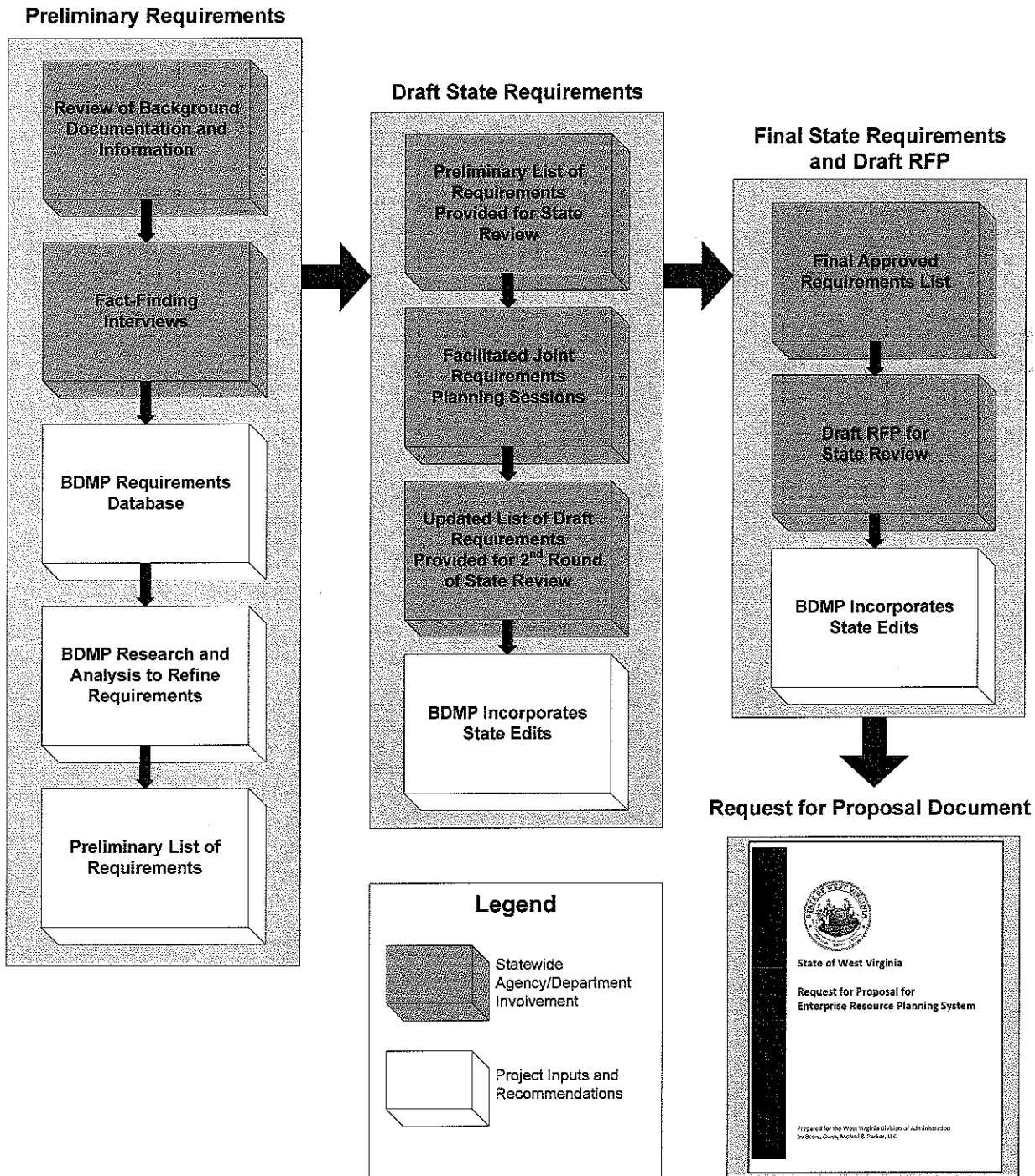
Following the JRP sessions, we will update the Technical and Functional Requirements document to incorporate information gained from State personnel. We have found that in following this process, we are able to use State personnel's time most effectively, while developing technical and functional requirements that are comprehensive and address the State's needs for the future system. The Technical and Functional Requirements will serve as a core component of the State's Request for Proposal (RFP) for an ERP system vendor.

We propose utilizing BDMP's custom-developed, web-based Microsoft SharePoint repository during the development of draft requirements, facilitating modifications as described above, and reaching general consensus on the completeness of functional and technical requirements. In future phases, this secure Microsoft SharePoint repository can be expanded upon for creating "Functional and Technical Specifications" during contract negotiation with the implementation vendor, as a checklist for items to test during User Acceptance Testing (UAT), and as a means for the State to know that each requirement that was originally requested has been provided to the State's satisfaction prior to go-live.

Exhibit A presents BDMP's Systems Requirement Development Methodology, which shows how the requirements definition process leads to the development of a comprehensive Request for Proposal that clearly describes the State's needs to prospective ERP system vendors.



Exhibit A: BDMP System Requirements Development Methodology



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Procurement, Vendor Selection, and Contract Negotiation Assistance

BDMP will assist the State in planning for the entire procurement and contract negotiation process to promote a fair and open competition. We are prepared to lead the development and issuance of a Request for Proposal (RFP), facilitate the procurement process (including vendor demonstrations, site visits, and coordination of proposal evaluation activities), and manage contract negotiations with the preferred vendor. Our approach to conducting procurement and contract negotiation activities is summarized in the points below:

- **Develop Request for Proposal and Scoring Matrix.** We will meet with the State's leadership team and a representative from the State Division of Purchasing to identify required standards for inclusion in an RFP (e.g., standard terms and conditions, required format, other language) and establish a timeline for the RFP development and procurement processes. We will then develop the RFP using a proven format that incorporates information on the history of the project, a description of the State's current environment, the State's desired approach to implementing a new ERP system, the State's functional and technical requirements, and a structured list of points for vendors to address in their response. In addition, we will work with the State to develop objective evaluation criteria to include in the RFP. We will then prepare a scoring matrix to track significant strengths and limitations of each proposal reviewed in terms of the established evaluation criteria.
- **Issue RFP and facilitate vendor conference.** BDMP will issue the RFP to prospective vendors utilizing the State's preferred RFP distribution methods. We will work in collaboration with the State throughout the procurement process, including responding to vendor questions by compiling the questions, distributing questions to the appropriate individual(s) for response, and drafting responses as requested in collaboration with the State. In addition, we will arrange and facilitate a pre-proposal conference for prospective bidders at State offices, including moderating the conference, recording questions/comments, and facilitating the response to questions.
- **Review vendor proposals.** BDMP will facilitate the proposal review process by reviewing each proposal, facilitating the evaluation team's review of proposals, compiling evaluations, and conducting a meeting with the evaluation team to identify a short-list of vendors to provide demonstrations of their products.
- **Develop demonstration scripts.** BDMP offers the State a unique set of qualifications in that one of our lead team members has not only assisted clients in facilitating vendor demonstrations, but has also demonstrated and implemented ERP software for numerous city, county, and state government clients. As such, we are well qualified to assist the State in developing a demonstration script that incorporates proven techniques and tactics to elicit useful information during the demonstration process. We will develop a draft demonstration script, provide it to the State for review, incorporate the State's feedback, and provide the script to vendors in advance of their on-site



demonstrations. We will also develop a scoring methodology and evaluation criteria for the demonstrations that will assist the State in scoring each demonstration.

- **Facilitate vendor demonstrations.** We will coordinate and facilitate vendor demonstrations at the State's offices. Our project team's extensive background in the demonstration process provides the State with a unique perspective on how to score, prepare, evaluate, and participate in vendor demonstrations. One best practice we have recommended frequently on similar past projects is to create both a vendor Demonstration Room and Demonstration Lab. Both rooms should have a computer with overhead projector utilizing the version of the software being demonstrated. The Demonstration Room will follow the "demonstration script" and should be limited in time, so that participants can compare one vendor's demonstration to that of another vendor's utilizing the same script. The Demonstration Lab provides participants time to ask follow-up questions without the pressure of interruption during the demonstration. Following each demonstration, we will meet with the State's evaluation team to assess the vendor's product utilizing the established evaluation criteria. At the conclusion of the demonstrations, we will then summarize the evaluation sheets and work with the State to rank the vendors.
- **Arrange site visits and develop site visit agenda.** We recommend the State visit similar organization(s) in which the finalist vendors have implemented the proposed system. This will provide an opportunity to ask questions, understand how the software is being used, and assess operational issues related to use of the software or implementation. BDMP will develop a recommendations memo to the State on how to prepare for site visits. As part of the memo we will identify State tasks that should be accomplished prior to visiting each site. The memo will include a list of materials that should be reviewed and step-by-step instructions for preparing for each meeting. We will then arrange the site visits, develop an agenda for the visits, and meet with the State's project team to discuss the agenda and answer questions regarding the site visits.
- **Summarize proposal evaluations and develop recommendations.** Following the site visits, we will develop a scoring summary and provide written recommendations identifying a preferred vendor and an alternate vendor that best meet the State's requirements as set forth in the RFP. We believe it is beneficial to identify two candidates at this stage, as it provides more leverage in the negotiation process and may lead to a more favorable contract for the City. In addition, should it be necessary to end negotiations with the preferred vendor, it is beneficial to maintain an open relationship with a back-up vendor.
- **Conduct contract negotiations.** We have been involved in contract negotiations from the client's, vendor's, and independent consultant's perspective and are knowledgeable about how the contract impacts the implementation process. In conducting contract negotiations between the State and the preferred vendor, we will draw on these experiences to ensure the State's best interests are being met. As part of that process,



we believe it is critical to develop a positive relationship between the State and the vendor, as this sets the foundation for a collaborative implementation process. We understand the roles of all parties involved in negotiations and will utilize our experience as facilitator to establish clear communication, trust, and good will amongst all involved.

We will work with the State's project team, the State's legal counsel, and the preferred vendor to develop a draft contract, utilizing the State's contracting procedures and the vendor's proposal as a starting point. We will review the vendor's proposal and the contract documents to establish that requirements are clearly defined in terms of the schedule, implementation process, fee arrangement, vendor resources, deliverables, costs, acceptance criteria, and terms and conditions. Our goal in reviewing these documents will be to identify ways of structuring the contract to increase the potential for project success. For example, often vendors attempt to collect the majority of their project fees as quickly as possible during the contract. During our review we will look for payment terms that are consistent with delivering the desired project outcomes and system functionality and hold the vendor accountable until the State has accepted the final deliverables as satisfactory.

In the past, we have also found some vendors have underestimated the scope of effort required to implement an ERP solution satisfactorily and in other cases have overestimated. We will use our ERP system planning and implementation experience to identify potential problem areas in these key project documents.

In addition, we will be "at the table" in negotiations with the preferred vendor. Should it become clear at any point during negotiations that the preferred vendor's solution or contract terms will not meet the needs of the State, we may recommend halting negotiations with the preferred vendor and commencing negotiations with the alternate vendor.

Business Process Improvement

An ERP system replacement project of this nature is one of the largest and most far-reaching initiatives a state government will undertake in terms of its impact on how work will be conducted in the future and how constituents will be served. Evaluating and improving current processes in alignment with the selected system is an important step to fully leverage the benefits and value of a new ERP system.

During the systems planning and requirements definition activities, it will be important for BDMP to understand the current processes and issues associated with the systems being replaced (e.g., Finance and Accounting, General Ledger, Accounts Payable, Accounts Receivable, Fixed Assets, etc.), including inputs/outputs, manual processes, and challenges, issues, and/or bottlenecks that exist. In developing a Business Case and recommendations for the State's replacement strategy, we will leverage our team's knowledge of ERP system features, functionalities, and best practices to identify opportunities to streamline inefficient or



challenging processes. Our experience with ERP systems and state government processes will allow us to make recommendations for improvement based on “best practices” as well as our knowledge of the existing functionality in ERP systems in the market today.

Following selection of an ERP vendor, BDMP will work with the State to revise and optimize business processes in conjunction with the system implementation, with a particular emphasis on those solutions that:

- Minimize changes or customizations to the software;
- Leverage best practices in the technology;
- Simplify the process of decision making;
- Reduce handoffs; and
- Increase productivity and effectiveness.

Drawing on our understanding of the current environment and the “As-Is” process documentation developed during the planning phases of this project, together with our knowledge of the best practices supported by the selected ERP solution, we will develop a Business Process Improvement Plan that sets forth the specific steps to shift existing processes to the desired future state, including potential impacts to the organization and departmental readiness for changing business processes. As part of the Plan, we will provide a timeframe for undertaking specific business process improvement activities. During the implementation, we will then manage and monitor the Business Process Improvement Plan and the implementation of business process changes across impacted State agencies.

Change Management

In conducting ERP systems planning and replacement projects, we have found that clients typically have developed their organization structure and business processes over the course of several years. The existing structures and processes are often inconsistent with the best practices offered by newer systems. Almost inevitably, some people within the organization are going to be resistant to change (e.g., because they believe the current systems/processes work fine, they can’t imagine doing it any other way, or they aren’t aware of the functionalities offered by more modern systems). As a result, a significant amount of emphasis needs to be placed on addressing personnel’s resistance to change.

We have experienced resistance to change in all of our systems planning, procurement, and implementation oversight engagements and have developed proactive strategies to manage change. As an example, in our recent work conducting an ERP Needs Assessment for the State of New Hampshire and subsequently providing Independent Verification & Validation (IV&V) services for the State’s ERP system implementation, we were part of a monumental shift that involved 67 State agencies (with 67 respective Commissioners) being required to migrate from their own financial systems and business processes to a single statewide ERP system. During the ERP Needs Assessment, we addressed the need for proactive change management should the State proceed with replacing its disparate systems with an integrated solution. Throughout the



implementation, we closely monitored the State's change management activities, communication with stakeholders, and participation/buy-in by stakeholder groups in the implementation process. We provided specific guidance and recommendations to strengthen change management practices and communications to address stakeholders' resistance to change and bring people on board. When the State went live with its new ERP solution in July 2009, agencies were ready for it and were invested in the project.

In our experience, we have seen that ERP projects are much more successful when change management is proactively built into all phases of the project. For the State of West Virginia's ERP replacement project, we recommend proactively managing change by involving stakeholders early on in the process, beginning with the systems planning phase, to build support and buy-in for the decisions that are made. Our approach for change management includes three key areas:

- **Project Communication** – Stakeholder communication is critical to the success of a large-scale systems project such as the one being undertaken by the State. When stakeholders are invested in the process and understand how the changes will impact their day-to-day lives, they will be more open to change. During initial project planning, BDMP will prepare a Communication and Outreach Plan as part of our overall Project Work Plan. This planning document will assess the viability of a project web-site, project newsletter, status reports, frequent email updates, and other communication mediums/vehicles as desired by the State. As part of the Plan, we will work with the State to identify the communication and awareness needs of each stakeholder or stakeholder group (e.g., Project Sponsor, Executive Steering Committee, Project Management Team, Ad-hoc Work Teams, etc.) and set forth the method and frequency of communication to address the communication needs of the intended audience. By starting the outreach early, stakeholders will have a chance to ask questions, understand what is expected of them in the process, communicate their expectations more clearly, and be better prepared for the commitment of time and energy needed to successfully implement the new system.
- **Change Management Plan** – We will work with the State to define the needs and approach for providing effective change management. We will develop a Change Management Plan that focuses initially on the system planning phase, with considerations for activities that should occur during the implementation. On selection of a preferred ERP system vendor, we recommend working with the State to update the Plan to incorporate change management activities during implementation, drawing on information gained during the planning (e.g., knowledge of organizational culture, departmental readiness for change, urgency of changes that need to take place, and the speed at which change has traditionally occurred).
- **Stakeholder Involvement** – BDMP's requirements definition process has proven to be an effective approach to communicating change and gaining buy-in from stakeholders. By involving stakeholders in Joint Requirement Planning (JRP) work sessions, the people who interact with the system daily are involved in defining the desired and critical functionality of the new system. In addition, through this process, we are able to educate stakeholders



on what is possible with a new system that they may not be able to do today, building on our team's knowledge of ERP system functionalities and national perspective. Not only does this provide the State with a more comprehensive list of requirements, but it also facilitates understanding and builds support for recommendations and future change.

Implementation Oversight

BDMP has provided independent oversight for several highly-visible, mission-critical large-scale implementations. While we understand that BDMP's role and scope of services to be provided during the implementation will be determined with the State during contract negotiations, the following points describe the types of services that BDMP has provided for similar implementations:

- Conduct Gap Analysis of the proposed solution to the State's final list of Functional and Technical Requirements and determine potential configuration options;
- Develop initial project planning documents and standards to guide the management of project scope, resources, risk, communications, and budget;
- Review the ERP system vendor's deliverables using a two-step approach that we have used successfully for other ERP implementation projects, which establishes clear expectations up front between the vendor and the State and reduces the amount of time required for formal deliverable reviews.
- Assist with documenting and/or updating policies and procedures based on the functionalities and best practices supported by the new system;
- Design, oversee, manage, and facilitate data conversations as necessary to implement specific software modules;
- Assist with the development of User Acceptance Test (UAT) scripts and provide oversight and assistance through system testing;
- Provide oversight of training activities and identify potential risks or issues to be addressed;
- Develop a Change Management Plan and provide oversight of the implementation of the Change Management Plan;
- Provide oversight of business process improvement activities, including documenting current processes and developing a Business Process Improvement Plan; and
- Provide ongoing project management oversight throughout the implementation, including participation in or facilitation of project management-related meetings, development of Status Reports, and ongoing management of risks, communications, quality control, budget, and vendor implementation activities.

Management of risk is central to our project approach. As an objective third party, BDMP will provide ongoing independent assessments of project risks and facilitate discussion of mitigation strategies with appropriate leadership from the State and the vendor. As part of our standard



practice and approach, we make a point of discussing findings and recommendations as issues arise rather than requiring vendor and State project management to wait to read them in our formal deliverable. In this way, we are often able to include progress toward the implementation of recommendations in our report deliverable. We are sensitive to the impact language choice and tone can have on secondary audiences and choose our words carefully.

g. Describe any significant problems encountered by the firm in other ERP system projects, explain issues and problem resolution and how those problems may be avoided in this project.

In this section, we have described four of the significant problems that BDMP has encountered with other large-scale ERP system replacement projects:

1. Lack of appropriate executive sponsorship.
2. Failure to understand when business processes should and should not be changed.
3. Integration versus interfacing with external systems.
4. Testing for appropriate database, application, and data access/security.

In addition to describing the challenges we have encountered in the past, we have provided an explanation of what BDMP recommends for this project to help avoid similar potential challenges.

1. Lack of appropriate executive sponsorship. Statewide ERP system implementation projects are among the most challenging change management exercises in the software implementation business. There are several reasons for this, although the most compelling is that most State government operations are comprised of disparate computer systems and business processes, and historically have not thought of the system or processes from the perspective of the enterprise. Historically, state departments and agencies have maintained ownership for their processes and systems, which can lead to challenges when rethinking how the business should function if one centralized system (or set of multiple fully integrated systems) were utilized.

The Executive Sponsor (sometimes called Project Sponsor) is a role in project management, usually the senior member of the project's Executive Committee (decision making body), that serves as the ultimate decision maker and is essential in "setting the tone" and promoting buy-in for the project among stakeholders. Executive Sponsors are instrumental to:

- Advocate the commitment to the project both internally and externally;
- Champion the project in the eyes of legislature and the public;
- Obtain funding for the project ;
- Accept responsibility for problems escalated from the project manager; and
- Ensure business leaders across the State sign off on key project documentation (e.g., business case, functional and technical specifications, training plan, testing plan, etc.).



Even with appropriate executive sponsorship, we have seen statewide ERP projects have a difficult time with managing effective organization-wide change. One approach to help build appropriate executive level buy-in within each major state department/agency with significant business processes changes associated with ERP is to develop a “Senior Management Team.”

We recommend that the State consider identifying a senior manager from each Department/Agency who will participate in a regular (e.g., monthly or bi-weekly, depending on the stage of the project) to stay apprised of project progress, address “enterprise” decision making, and help to facilitate executive sponsorship and support for the project and business process improvement decisions made during the project. Departments and agencies need an opportunity to feel heard. The Senior Management Team can serve as an appropriate voice between the State’s business operations and the technical challenges of a new system implementation. Through this team, the Executive Sponsor can facilitate action, drive the need for change, and stay appropriately connected with the varying needs across the enterprise.

2. Failure to understanding when business processes should and should not be changed. “Best practices” can mean different things to different organizations and can vary for legitimate reasons. Many of the best practices associated with commercial ERP systems have been developed and refined over years of working with public sector agencies and are widely recognized for reducing costs and improving efficiency. However, some best practices are dependent on the client’s specific needs and priorities (e.g., the approach taken for implementation), and therefore may not be as relevant or important to the State. BDMP will consider the best practices supported by each ERP vendor and the benefits offered by those best practices against the specific business needs and priorities identified by the State.

In evaluating software functionality and best practices against the State’s identified needs, there are at least four potential alternatives the State may consider:

1. Configure the software to provide the functionality required;
2. Customize the software to meet the State’s existing processes;
3. Modify the existing business processes; or
4. Eliminate the process/functionality all together.

A key step in determining the business processes that will need to be modified and the modifications that will be required (if any) is to evaluate the extent to which the vendors’ proposed systems meet the State’s requirements. As part of each vendor’s proposal response, if the software does not meet the State’s needs, the vendor will be directed to indicate whether the requirement can be met by customizing or configuring the software, or whether the State’s requirement cannot be met. On receipt of vendor proposals, BDMP will develop a Gap/Fit Analysis Summary that identifies the ability of each vendor’s software to meet each of the State’s business processes and system requirements. This Summary will help to identify those systems that offer the best level of fit with the State’s needs.



In addition to the Gap/Fit Analysis Summary, we recommend that one of the first key deliverables provided by the selected software/implementation vendor is a Gap/Fit Analysis Report that clearly identifies which State business functions and system requirements are not met with the existing software. The Report will include a recommendation from the vendor as to how the State's requirements can best be met (e.g., by changing the process, customizing the system, configuring the system, or doing away with the process/system requirement all together).

Because software customizations and the maintenance of these customizations can be very expensive, we generally encourage clients to consider alternatives other than modifying the source code. For those functions and requirements where the vendor recommends the software should be customized, the vendor will be directed to provide a clear description of the required modification(s), identify the cost to modify the software and how the cost estimate was determined, and describe the impact on future maintenance and system upgrades (if any).

While we do not generally recommend customizing the software, we do recommend that the State take full advantage of opportunities to configure the software to meet its needs. ERP systems are built with flexibility to configure the software to meet certain needs of the organization. The vendor will also be asked to identify recommendations for areas where the software could be configured to meet the needs of the State, together with the costs and any impacts on future maintenance and upgrades (if any). Additional needs for configuring the software may also be identified by the State and BDMP during the Joint Application Design (JAD) sessions with the selected software/implementation vendor.

Reaching general consensus from State stakeholders on modifications to business processes or software is the next step in the process. BDMP will facilitate and discuss the vendor's recommendations with the core business users of the system module in question. In our experience, end users are sometimes resistant to changing business practices that have been in place and "working" for decades. There can be a comfort in suggesting "we have always done it that way, and we will always do it that way." When appropriate, we will challenge State stakeholders to reexamine this way of thinking, prior to agreeing to or requiring a software customization. With each customization, particularly if it impacts future software maintenance and system upgrades, we will thoroughly discuss process change alternatives versus the customization to reach a common consensus on the best approach. Once the State has determined an agreed-upon approach, the vendor will be asked to summarize the approach and clearly document the resulting decisions for what should be modified in the software versus what business processes should change to accommodate the new software.

Lastly, in our experience, sometimes State staff and the software/implementation vendor find new requirements and business process changes that were not originally discussed or identified as part of the vendor's Gap/Fit Analysis Report. Monitoring and managing project scope, particularly as it relates business process changes versus software customizations, is critical in large, complex enterprise projects like implementation of a new ERP system. We will work with



the State and the software/implementation vendor to clearly set forth a process for identifying and approving additional requirements and business processes after the implementation is underway. We envision utilizing the BDMP Microsoft SharePoint repository (BDMP KnowledgeLink) to track functional and technical requirements, and have the capability to distinguish between requirements that were added to project scope after the initial contract with the implementation vendor has been signed.

3. Integration versus interfacing with external systems. When developing Functional and Technical Requirements, we distinguish between integration and interface requirements. An interface can be as simple as a file exported out of one system and manually uploaded to another. In contrast, integration requires that both systems seamlessly connect, if not share the same database to exchange data.

During the development of the Functional and Technical Requirements, BDMP will work with the State to clearly document the list of point applications that exist in the State's current environment that will not be going away. As part of the documentation, we will provide information on the State's software products and software versions being utilized. In addition, we will identify system interface and integration requirements with the existing system, as well as anticipated interface and integration requirements in the future environment.

One critical way to distinguish between vendors that respond to the State's RFP is their experience integrating/interfacing with the same software applications being used by the State. In developing the RFP, BDMP will direct vendors to discuss their approach to integrating and interfacing with key applications, in addition to their past experience with the State's identified point applications. Additionally, we expect that addressing integration with point applications will be a critical part of the demonstration script that will be used during the vendor demonstration process. Another important consideration is to select site visit locations that utilize similar point applications in order to learn more about the vendor's/software's ability to integrate in a manner consistent with the State's expectations.

4. Testing for appropriate database, application, and data access/security. One common error of ERP system implementations is to overlook the complexities involved with making appropriate database, application, and data access/security decisions that are necessary to be successful with a single, enterprise-wide database platform. BDMP will document data security and system controls requirements during the functional and technical requirements definition process. We will utilize the Joint Requirements Planning (JRP) work sessions to engage State staff (particularly the IT staff) on identification of appropriate security and system controls requirements. In addition, we will draw on the security and controls requirements we have developed and reviewed in other similar ERP implementations across the country. During the facilitated JRP works sessions, we will discuss the State's perspective on unique/complex security requirements not addressed by the preliminary list of technical requirements. Once agreed upon as a system requirement, the technical list of data security requirements will be utilized as part of vendor demonstration process and site visits.



Most ERP vendors provide similar functionality, but many implement security in dramatically different ways. Utilizing the vendor demonstration process to not only ensure the requirement is met, but understand how it will be met in comparison of other vendors will be a critical component of selecting a system that meets the State's data security requirements. In addition to the steps that are taken pre-implementation to incorporate data security into the ERP solution, we also recommend conducting a security assessment prior to completing the testing and training phase that provides an independent opinion and assessment of vulnerabilities and threats. This is a service BDMP has provided for similar Statewide ERP implementations and we are prepared to provide during this project.

h. Describe your firm's approach and methodology for retaining a stable consulting staff throughout the contract duration for this project. Include processes currently in place for motivating staff and ensuring technical competence in a changing technological environment.

BDMP takes great pride in providing a progressive and positive work environment for our employees. We provide competitive benefits, as well as ongoing opportunities for continuing professional education. In fact, all of our consulting personnel are required to complete at least 120 hours of continuing professional education every three years, which contributes to their consulting, information technology, and management proficiency. Each member of our information technology consulting staff typically exceeds this requirement by completing both technical and industry-specific educational programs each year. In addition, our consultants routinely conduct technology presentations, speak at industry events, and participate in relevant industry conferences.

As a result of our work environment, benefits, and opportunities for continuing professional education, BDMP maintains an annual turn-over rate of 10% or less, which is significantly lower than the average turn-over rate for national consulting and accounting firms.

While we do not anticipate the need to replace key staff over the course of this engagement, we believe it is important that the State understands we have additional qualified resources to draw upon should the need arise. Within BDMP's Management and Information Technology Consulting Group, we have a team of 30 individuals, including four certified Project Management Professionals (PMPs) and a team of consultants with extensive experience in providing systems planning, procurement, and implementation oversight services to government agencies.

We have structured our team to provide built-in back-up of key resources during planned periods when one of our key team members is unavailable (e.g., vacations). Our Project Manager will conduct regular meetings with BDMP's project team to review project activities and resource needs, so that when short-term staffing modifications are required, the State's project schedule will not be adversely impacted. As part of our regular status reporting process, we will address the availability of BDMP team members over the upcoming reporting period so that all State and BDMP team members are aware of planned staffing schedules.



In the event we need to draw upon other backup personnel within our firm, we have developed processes and systems to provide all members of our Consulting Group with the information they need to gain an understanding of the history of the project and quickly get up to speed on the current status of the project. We conduct regular management team meetings (amongst BDMP's team of project managers/leads on various engagements) to keep managers apprised of the status on the projects we currently have underway. In addition, we maintain an electronic repository with project documentation (e.g., meeting minutes, status reports, deliverable documents, etc.), which would provide backup personnel with the background knowledge and project information needed to fill the role.

i. Disclose any legal or organizational relationships your company has with consultants of ERP software. Describe the nature of the relationship. Also, identify any business partner or alliance relationships you have with consultants of ERP software. Describe the nature of the partnership or alliance.

BDMP does not have any legal or organizational relationships with consultants of ERP software, nor do we maintain business partnerships or alliances with ERP software consultants. BDMP is an independent management and technology consulting firm. We do not sell or develop computer hardware or software. We focus on providing independent and objective consulting services to guide clients with planning for and implementing change related to operations, management, and information systems.

j. Disclose any agreements or relationships with software or hardware consultants that may present a conflict of interest to your company and potentially affect your ability to objectively advise the State on hardware or software selection.

BDMP does not have any agreements or relationships with software or hardware consultants that may present a conflict of interest or affect BDMP's ability to objectively advise the State on hardware or software selection. BDMP is an independent management and technology consulting firm. We do not sell or develop computer hardware or software. We focus on providing independent and objective consulting services to guide clients with planning for and implementing change related to operations, management, and information systems.

k. Provide any information on any industry accepted best practices that your company has adopted or attained certifications in such as ISO 9001 or the Software Engineering Institute's (SEI) Capability Maturity Model (CMM).

BDMP is experienced with and has developed its requirements definition process based upon the IEEE Standard 830-1998. BDMP has incorporated these standards into our Software Requirements Development Methodology (as shown on page 11, in response to question f). The requirements definition process is the one time in the design or selection of a new system when a broad group of stakeholders is brought together for the purpose of identifying and agreeing to a set of system requirements that will guide all subsequent project activities. It is



during this process that many of the most significant business decisions are identified and made as stakeholders navigate a process of requirements prioritization and identifying desired capability. As stated in the IEEE standard, an effective business requirements document should consider the following issues:

- System functionality (i.e., business requirements);
- External interfaces;
- System performance requirements (i.e., speed, availability, etc.);
- System attributes (i.e., security, portability, administrative maintenance, etc.); and
- Design constraints (i.e., new State subsystems will be developed in a J2EE based production environment and hosted on IBM WebSphere / Oracle / HP UX environment).

Additionally, our proposed requirements definition process is designed to ensure that requirements will meet the IEEE standards of being correct, unambiguous, complete, consistent, verifiable, and ranked in importance. We have conducted requirements definition projects for numerous state agencies, municipal governments, and for the anticipated modules desired by the State of West Virginia. We understand the difficult situations that may arise from having system requirements that do not fully and accurately convey the State's needs. We are confident that our proposed approach to conducting the requirements definition process will result in system requirements that meet the State's objectives for this project.

In addition to standardizing our methodology based on IEEE's Standard 830-1998, BDMP has adopted Project Management Institute (PMI) best practices when it comes to providing consulting services. Our team includes two certified Project Management Professionals (PMPs) who are committed to using PMI best practices and ensuring effective project management is followed throughout the engagement. We are accustomed to large-scale ERP system planning, selection, oversight, and project management projects such as the ERP project West Virginia is undertaking and know firsthand the level of effort that will be required, the common challenges that will be experienced, and the importance of effective project management experience to help guide this effort. We will use our experience to provide clear, upfront communication and create a working partnership between the State and our project team to ensure the output from this project meets the State's needs.

As part of our adoption of industry trends and best practices for Statewide ERP planning and implementation projects, we have developed a customized MS SharePoint client portal, *BDMP KnowledgeLink*, as an online, collaborative project tool to facilitate secure scheduling, contact management, document collaboration, document archiving, group discussions, and general knowledge sharing. For similar projects conducted by BDMP, we have created, tracked, and archived all project documents and made them available to the client's project team in an easily searchable, secure format. Each client project team member is provided appropriate access to the project site, which becomes a central point for sharing knowledge, coordinating project logistics, and maintaining project archives (including meeting agendas, meeting minutes, status reports, internal memos, and completed project deliverables).



In addition to Requirements Definition, Project Management Best Practices, and collaboration software, BDMP staff also maintains several industry credentials/certifications that will be relevant to the success of this project. Our Consulting Group is comprised of individuals with a broad range of skills, experience, and industry-related knowledge. Following is a list of relevant professional certifications held by members of our Consulting Group:

- CPA (Certified Public Accountant)
- CCP (Certified Computing Professional)
- CEH (Certified Ethical Hacker)
- CFE (Certified Fraud Examiner)
- CGEIT (Certified in the Governance of Enterprise IT)
- CISA (Certified Information Systems Auditor)
- CISM (Certified Information Systems Manager)
- CISSP (Certified Information Systems Security Professional)
- CNE (Certified Novell Engineer)
- CPP (Certified Process Professional)
- MCP (Microsoft Certified Professional)
- MCSA (Microsoft Certified Systems Administrator)
- MCSE+M (Microsoft Certified Systems Engineer + Messaging)
- PMP (Project Management Professional)



I. Provide the firm's most recent audited financial statement and DUNS number.

As a privately-held entity, BDMP is not required to prepare audited financial statements; however, Exhibit B exemplifies the strong financial condition of our firm. BDMP has sustained steady growth during our 35-year history. Should you require additional information regarding BDMP's financial stability, please contact Benjamin C. Geci, Senior Group Vice President at TD Bank in Portland, Maine, at (207) 761-8577. Our DUNS number is 07-173-5229.

	FY 6/30/2009 (\$ in millions)	FY 6/30/2008 (\$ in millions)	FY 6/30/2007 (\$ in millions)
Net Revenue	\$32.3	\$28.5	\$27.3

Exhibit B: Net Revenue for Previous Three Fiscal Years

**Berry Dunn McNeil & Parker
Condensed Financial Information
For the Periods Ended
(Confidential)**

	FY07 06/30/07	FY08 06/30/08	FY09 06/30/09
Current Assets	\$ 10,720,984	\$ 9,780,516	\$ 10,424,890
Fixed Assets, Net	1,066,660	1,266,144	938,332
Other Assets	-	-	-
	<u>\$ 11,787,644</u>	<u>\$ 11,046,660</u>	<u>\$ 11,363,222</u>
Current Liabilities	3,376,322	3,181,684	3,165,600
Amounts due Principals & Principals' Equity	8,411,322	7,864,976	8,197,622
	<u>\$ 11,787,644</u>	<u>\$ 11,046,660</u>	<u>\$ 11,363,222</u>
Operating Revenue	27,272,218	28,545,773	32,280,536
Operating Expenses	(26,681,980)	(27,951,548)	(31,707,097)
Depreciation & Amortization	(493,773)	(518,997)	(532,862)
Interest Expense	(96,465)	(75,228)	(40,577)
	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>



m. Provide a list of subcontractors which may be utilized in this engagement.

Based on the methodology we have described in response to this Expression of Interest, we do not anticipate subcontracting work to third party vendors during the project. We have the resources and expertise within our Consulting Group to meet the State's needs for this project.



2. QUALIFICATIONS (RFP SECTION 3.7.2)

a. Describe how long the firm has been performing the services required by this Expression of Interest and include the number of years in business overall.

BDMP was formed in 1974 as a regional Certified Public Accounting firm. Our Management and Information Technology Consulting Group was formed in 1986 to serve the technology, business, and organizational needs of BDMP clients. Our Consulting Group has been providing relevant systems planning, procurement, contract negotiation, business process analysis, change management, and implementation oversight services throughout our 23-year history.

We have a dedicated team of consultants to serve the needs of government agencies and have worked with more than 125 state, county, and local government clients across the country. A significant focus of our Consulting Group's work focuses on assisting government agencies with planning for, selecting, and implementing new financial/ERP systems.

b. Describe the firm's organizational structure including number of employees, client base, and location of offices.

BDMP is a Limited Liability Company organized in the State of Maine with approximately 200 employees. We are headquartered in Portland, Maine, and have offices in Bangor, Maine; Boston, Massachusetts; and Manchester, New Hampshire. We provide a full range of services to our clients, including IT consulting, management consulting, audit and accounting, and tax services. We have served clients in 40 states throughout the United States (as shown in Exhibit C) and in New Brunswick and Quebec, Canada.

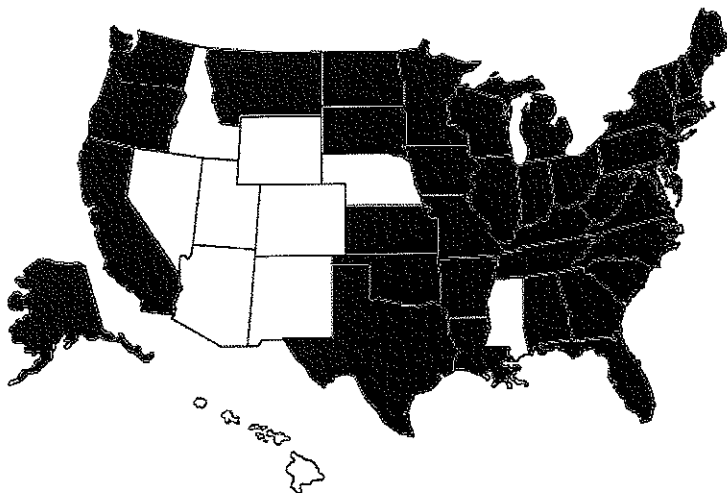


Exhibit C: Map of Client States Served



BDMP has assisted a broad range of state agencies across the country to address challenges and adopt best practices related to technology, management, and business process optimization, as shown in Table 1. We have fundamental understanding of state government operations, including the business processes and technologies used to support day-to-day operations and the common data, integration, and reporting needs. Our understanding of state government operations and our national perspective is critical when facilitating a project of the size and scope of West Virginia's ERP system replacement initiative, which will impact how work is conducted across all of the State's agencies and departments.

Table 1: Representative Sample of State Agencies Served by BDMP

Connecticut Department of Public Health
Illinois State Board of Education
Iowa Office of the State Auditor
Louisiana Department of Health and Hospitals
Maine Bureau of Accounts and Controls
Maine Bureau of Motor Vehicles
Maine Department of Administrative and Financial Services
Maine Department of Labor
Maine Department of Transportation
Maine Office of the CIO
Maryland Judiciary
Maryland Lottery
Massachusetts Group Insurance Commission
Massachusetts Human Resources Division
Massachusetts Information Technology Division
New Hampshire Department of Administrative Services
New Hampshire Department of Resource and Economic Development
New Hampshire Secretary of State
North Carolina Office of the State Auditor
North Dakota Office of the State Auditor
Vermont Agency of Transportation
Vermont Department of Information and Innovation
Vermont Department of Taxes
Virginia Employment Commission
West Virginia Bureau for Medical Services
West Virginia Department of Health and Human Resources



c. Provide a statement regarding the firm's ability to complete work associated with this Expression of Interest and whether the firm plans to subcontract work. If subcontracting is anticipated, please provide a list of services proposed for subcontracting.

We have proposed a core team of seven individuals to provide the proposed ERP system planning, procurement, and implementation oversight activities. In addition, we are able to draw on the other individuals in our 30-member Consulting Group, including experienced project managers, business and technical analysts, and individuals experienced in leading business process improvement and managing large-scale change initiatives. Within our Consulting Group, we have five certified Project Management Professionals with the experience and qualifications to lead a large-scale system replacement initiative of the scope being undertaken by the State of West Virginia.

We have the resources, qualifications, and expertise within our Consulting Group to address the State's needs for this project. Based on the methodology we have described in response to this Expression of Interest, we do not anticipate subcontracting work to third party vendors.



3. EXPERIENCE (RFP SECTION 3.7.3)

a. Describe the Consultant's experience in assisting governments in the development of the solicitation document, preparation of responses to inquiries during the bid process, assisting in the evaluation of solicitation responses, assisting in conducting interviews and ERP system demonstrations, and assisting in negotiating a contract with the selected ERP vendor.

BDMP's Government Consulting practice focuses on serving the needs of state and local government agencies. Since the inception of our Management and Information Technology Consulting Group in 1986, we have worked with more than 125 government agencies across the country to provide independent services related to enterprise systems planning, business process improvement, procurement of enterprise systems, project management, and implementation oversight.

We have a structured format for developing system requirements, Requests for Proposals (RFPs), evaluation criteria, and demonstration scripts to promote a thorough, fair, and equitable procurement process (as described in Section 1.f). In addition, we have been "at the table" in contract negotiations from both the vendor and client perspective and use this knowledge and experience to negotiate a contract that is in the best interest of our clients.

We have evaluated the benefits and drawbacks of a range of ERP system alternatives, including maintaining or enhancing current systems, building new systems, purchasing commercial off-the-shelf (COTS) systems, and utilizing open source solutions. We are also experienced in providing project management, quality assurance, and independent project oversight services for multi-year implementations.

One of the advantages that BDMP brings to this role is our independence from prospective ERP system vendors or implementers. As an independent consulting firm, we do not develop, sell, or implement hardware or software, nor do we enter into partnerships with system vendors or implementers that could impair our objectivity.

Of particular significance to the State of West Virginia's needs, two of our proposed key team members were formerly employed by vendors of ERP systems. These individuals served in various capacities, including as demonstration specialists, implementation project managers, and technical support specialists. Through these experiences, we offer the State a unique perspective into the procurement process, beginning with the development of comprehensive requirements and a structured RFP and carrying through to the vendor demonstration and contract negotiation processes.

We understand the tactics that are sometimes used by vendors during system demonstrations and use this perspective to develop demonstration scripts that incorporate proven techniques to elicit useful information during the demonstration process. In addition, we understand how



contracts for software and implementation services impact the implementation process, including factors such as the implementation schedule, payment terms, implementation process, vendor resources, deliverables and milestones, acceptance criteria, and terms and conditions. For example, we have also found some vendors have underestimated the scope of effort required to implement an ERP solution satisfactorily and in other cases have overestimated. We use our team's ERP system planning, procurement, and implementation experience to promote a fair and open procurement that best meets the needs of our clients.

b. Describe the Consultant's experience with multiple ERP software systems and multiple software implementers in government applications.

Table 2 describes BDMP's experience with Tier 1 and Tier 2 ERP software vendors, including those that were reviewed by BDMP as part of systems planning engagements and those that were selected by a client for implementation.

Table 2: BDMP's Experience with Tier 1 and Tier 2 ERP Vendors

Vendor	Description of Experience
American Management Systems (AMS)	Over the years BDMP has worked with numerous clients that have utilized components of AMS ERP systems, including Arlington County, Virginia; the City of Richmond, Virginia; and the State of New Hampshire.
CGI, Inc.	BDMP has reviewed CGI as part of several systems planning projects for clients in the public sector.
HTE Government Systems	BDMP evaluated HTE as part of our technology planning work with the City of Port Orange, Florida, and as part of an application migration assessment for Kent County, Delaware.
JD Edwards	BDMP has evaluated JD Edwards as part of several systems planning projects with public sector clients.
Lawson	BDMP provided independent Quality Assurance Oversight of the State of New Hampshire's Lawson ERP system implementation.
Microsoft Dynamix	BDMP has reviewed Microsoft Dynamix as part of several systems planning projects for clients in the public sector. Tampa Port Authority selected Microsoft Dynamix for their ERP system.
MUNIS	BDMP evaluated MUNIS as part of several systems planning projects. MUNIS was selected by clients in the Cities of Newport News and Richmond, Virginia; and the Town of Leesburg, Virginia.
New World	BDMP has reviewed New World as part of several systems planning projects for clients in the public sector, including a project for Kent County, Delaware, which resulted in the selection of New World.



Vendor	Description of Experience
Oracle	BDMP has reviewed Oracle as part of several systems planning projects for clients in the public and private sectors. A systems planning project led by BDMP for a New England manufacturing firm resulted in the selection of Oracle.
Pentamation	BDMP worked with the City of Fairfax, Virginia, to identify opportunities for improving business processes in conjunction with their planned upgrade of Pentamation. As part of the project, we received training on the software and gained significant understanding of the software's features and functionalities.
PeopleSoft	BDMP has reviewed PeopleSoft as part of several systems planning projects for clients in the public sector, including a project for the State of Vermont, which resulted in the selection of PeopleSoft. BDMP is currently providing Independent Verification and Validation (IV&V) services for the Commonwealth of Massachusetts' PeopleSoft HRD upgrade from version 8 to version 9.
Sage	BDMP evaluated Sage as part of our systems planning work with the Tampa Port Authority.
SAP	BDMP conducted a project for the City of Toledo, Ohio, which involved evaluating the City's current environment and providing recommendations related to the upgrade of its existing SAP software or replacement with another commercial system. The City chose to upgrade its existing SAP software.

By conducting Statewide ERP planning projects, leading system selections, facilitating vendor demonstrations, providing implementation oversight, providing Independent Verification and Validation (IV&V) services, and conducting independent project reviews, BDMP has had experience with several national ERP implementation vendors. Table 3 presents our experience with implementation vendors.

Table 3: BDMP's Experience with Implementation Vendors

Vendor	Description of Experience
Anteo Group	BDMP conduct an independent project assessment for the State of Vermont's financial system upgrade of PeopleSoft that was being managed by the Anteo Group. Anteo has previously implemented Oracle and SAP systems for clients like the State of Georgia.
Arthur Anderson Consulting, LLC	BDMP conducted an independent review for the State of Vermont's PeopleSoft upgrade, for which Arthur Anderson was providing implementation services.



Vendor	Description of Experience
CedarCrestone	BDMP conducted an ERP systems planning, requirements definition, and RFP development project for the City of Toledo. CedarCrestone responded to the RFI and functional and technical requirements. The State of Ohio, State of Kansas, and State of Idaho as existing CedarCrestone clients.
Ciber, Inc.	BDMP conducted IV&V of the State of New Hampshire's ERP solution being implemented by CIBER and during a recent Independent Project Review for the State of Vermont. At a minimum, CIBER has previously partnered with IBM, Lawson, Microsoft, Oracle, and SAP.
Maximus	BDMP has conducted an independent review of a Maximus-led system implementation for the State of Vermont, and BDMP led the Independent Verification and Validation services for the State of New Hampshire where Maximus had helped to develop functional and technical requirements.

c. Describe experience with making decisions about hosting software, including risks, benefits, and cost analysis.

Through our work with state and local government IT departments, we have found that IT budgets have become increasingly constricted and that IT leaders are continually seeking cost saving opportunities. One area that BDMP frequently evaluates for potential cost savings as part of government ERP system planning projects is hosting and implementation alternatives, such as web-hosted applications (Application Service Provider, ASP), Software as a Service (SaaS), dedicated hosting services, and managed hosting services. As part of our analysis, we consider the short- and long-term benefits and drawbacks of the alternatives, including the level of risk involved with the alternative, clients' willingness to take on risk, clients' IT staffing capabilities for maintaining and updating the software, and associated costs.

We have evaluated hosting options for recent ERP system planning projects for Arlington County, Virginia; Kent County, Delaware; the City of Newport News, Virginia; and the City of Toledo, Ohio, among others. In addition, one of our proposed senior team members previously worked for an ERP vendor that has an Application Service Provider offering. In his role with the vendor, he regularly evaluated government agencies' needs to determine whether ASP was a viable option.

d. Provide a list of all government-related ERP projects completed by the firm. Address how the experience gained (successes and failures) from these engagements can be applied to the Requirements Definition phase of the West Virginia ERP project.

Table 4 presents ERP system consulting projects led by BDMP, including a description of the experiences gained and lessons learned that can be applied to West Virginia's ERP project.

Table 4: Description of BDMP's Government ERP Projects

Client	Project Description	Lessons Learned
State of New Hampshire	ERP System Feasibility Study and Quality Assurance Oversight of Statewide ERP System Implementation (ERP Vendor – Lawson, Implementation Vendor – CIBER)	<p>In our work conducting an ERP System Feasibility Study and providing Quality Assurance Oversight services for New Hampshire's statewide ERP system implementation, we were part of a monumental shift that involved 67 State agencies (with 67 respective Commissioners) being required to migrate from their own financial systems and business processes to a single statewide ERP system. Some agencies were receptive to the shift to the new system, while others were resistant to change.</p> <p>In our Quality Assurance Oversight work, we closely monitored the State's change management activities, communication with stakeholders, and participation/buy-in by stakeholder groups in the implementation process. We provided specific guidance and recommendations to strengthen change management practices, communications, and approach to demonstrating Executive Sponsorship to address stakeholders' resistance to change and bring people on board. The State went live with the new system in July 2009. While agencies recognized that the new system is a significant change, they were ready for it and invested in the project.</p>
Massachusetts Human Resources Division	IV&V of PeopleSoft Human Resources Software Upgrade	<p>Massachusetts' requested approach to IV&V for this PeopleSoft upgrade is different than the IV&V approach that BDMP typically</p>

Client	Project Description	Lessons Learned
		<p>provides for large-scale system implementations and upgrades, in that rather than providing consistent IV&V services from project initiation through to completion, BDMP provided an initial risk assessment of the upgrade activities conducted to date, followed by three point-in-time assessments at the completion of the Construction, Transition, and Deployment phases.</p> <p>One of the key challenges associated with how the IV&V services are structured for this project is that, without the ability to provide ongoing independent oversight of implementation activities, BDMP loses the ability to recommend <i>proactive</i> strategies to address issues and risks as they arise. However, given the current national fiscal climate, Massachusetts' IV&V approach is a creative, cost-effective means of providing an independent analysis of risks and measurement of project "health."</p>
<p>Maryland Judiciary</p>	<p>Court Revenue and Cashiering System Needs Analysis, Requirements Definition, RFP Development, Procurement, Contract Negotiations, and Independent Implementation Oversight (selected vendor – Active Government)</p>	<p>The Maryland Judiciary has shared with us that BDMP's model for conducting requirements definition and system selection was new to the Judiciary and has been met with such great success that the Judiciary is now using this model for all of their system planning and procurement projects. They have been impressed by how BDMP's requirements definition methodology has emphasized stakeholder involvement from the outset and how successful our approach has been in regards to getting stakeholders invested in the process. Given the significant shift that West Virginia's ERP replacement project will have on stakeholders across State agencies and departments, we believe that the BDMP's requirements definition approach will be beneficial to promote investment, understanding, and buy-in among State stakeholders.</p>

Client	Project Description	Lessons Learned
<p>Maine Bureau of Accounts and Controls</p>	<p>Needs Analysis, Requirements Definition, and Project Management Oversight of Statewide Time and Attendance Management System Implementation</p>	<p>The implementation of Maine's Statewide Time and Attendance Management System (MS-TAMS) impacted every State employee. Critical factors in the success of this project included effective project management, communication, change management, and training, so that when MS-TAMS went live, every State employee was ready for the transition. For example, in our role as Project Manager during the implementation, BDMP worked with the State to roll out training on a department-by-department basis, which allowed the trainers to modify and adapt training materials to meet specific end users' needs. As a result of our work on this project, BDMP's Project Manager was recognized with a Certificate of Excellence in Project Management by the State.</p> <p>MS-TAMS was adapted from a Time and Attendance Management System that was originally developed for Maine's Department of Transportation. The initial planning, needs analysis, and requirements definition process for the Statewide system underscored the differences in business requirements among State agencies and the need to build in adequate development time to ensure that the system met the needs of all State agencies.</p>
<p>Vermont Department of Information and Innovation</p>	<p>Independent Review of Proposed PeopleSoft Upgrade Project and PeopleSoft Project Management Services Contract</p>	<p>Prior to executing a contract with a large-scale ERP system vendor and associated service providers, there is significant benefit to having an independent third party evaluate the proposed solution, the contract, the vendor's and the State's readiness to proceed with the proposed solution, and other factors associated with the contract. In conducting this review of Vermont's proposed PeopleSoft upgrade, we were able to identify risks and issues, recommend modifications to the contract and planning documents, and identify critical factors that must be addressed by the State</p>

Client	Project Description	Lessons Learned
<p>City of Richmond, Virginia</p>	<p>ERP System Needs Analysis, Requirements Definition, and RFP Development (vendor selection process pending availability of funding)</p>	<p>The City of Richmond has shared with us the significance of BDMP's knowledge of ERP systems as they undertook their ERP systems planning project. Stakeholders from across the various City departments did not know what it could expect out of newer, commercial ERP systems. BDMP's approach to developing requirements in conjunction with City stakeholders and end users was critical in building awareness of the features and functionality of modern ERP systems and in developing requirements that addressed the City's specific needs. Given our understanding of West Virginia's current environment and long history with WVFIMS, we believe that BDMP's requirements definition methodology and our knowledge of ERP system functionality will be well received by State stakeholders.</p>
<p>City of Toledo, Ohio</p>	<p>ERP System Needs Analysis, Requirements Definition, and Development of Recommendations (selected vendor – SAP)</p>	<p>One of the challenges we see frequently with ERP system planning projects is that work is being conducted in "silos" across an organization. With consideration for this, BDMP structured our work with the City of Toledo to involve a broad spectrum of stakeholders with varying perspectives on the processes being evaluated. For example, in evaluating procurement functions, rather than only involving procurement personnel in the information gathering process, we involved individuals from multiple departments across the City that were involved with procurement-related activities to understand how procurement business processes were conducted. This promoted a greater sense of awareness among departments as</p>

Client	Project Description	Lessons Learned
<p>City of Newport News, Virginia</p>	<p>ERP System Needs Analysis, Requirements Definition, Make-or-Buy Analysis, and RFP Development (selected vendor – MUNIS)</p>	<p>In conducting procurements, clients have the option of requesting costs to be provided under separate cover or incorporated into the Technical Proposal. The City of Newport News, Virginia’s ERP procurement underscored the benefit of separating Technical and Cost Proposals as part of the evaluation process, particularly in a downturned economy. By separating the Cost Proposal, the City’s Evaluation Team was able to focus on the technical evaluation of the vendor’s proposal without the potential of being impacted by cost.</p> <p>While we recognize that cost is an important factor of any large software purchase, we have found that keeping costs separate from the Technical Proposal promotes a more objective evaluation of vendors’ capabilities and proposed solution.</p>
<p>Town of Leesburg, Virginia</p>	<p>ERP System Needs Analysis, Requirements Definition, RFP Development, Procurement, Contract Negotiations (selected vendor – MUNIS), and Business Process Improvement</p>	<p>One of the significant “lessons learned” that we believe the Town of Leesburg would share is the importance of involving an independent and knowledgeable third party in the contract negotiation process with the ERP vendor. BDMP led the contract negotiation process between the Town of Leesburg and its preferred vendor. As part of the process, we evaluated the vendor’s proposed scope of effort and negotiated terms related to the fee structure, deliverables timeline, and acceptance criteria. We identified specific</p>

Client	Project Description	Lessons Learned
Tampa Port Authority (Florida)	ERP System Needs Analysis, Requirements Definition, RFP Development, Procurement, and Contract Negotiations (selected vendor – Microsoft Dynamix)	<p>modifications to scope and terms to ensure the Town was only purchasing the modules and services that they needed and to establish a payment structure that was in the Town’s best interest. As a result of our involvement in the contract negotiation process, the Town saved approximately 20% of the originally proposed contract value with the vendor.</p> <p>Drawing on our Project Manager’s previous experience working for a systems vendor, we recommended that the Tampa Port Authority not only conduct structured and facilitated vendor demonstrations (whereby each vendor follows a script and the evaluation team is able to see an “apples to apples” comparison of each vendor), but also to provide a Demonstration Lab. The Demonstration Lab allowed members of the evaluation team additional time following the scripted demonstration to “dig into” the vendor’s system, ask follow-up questions, and address concerns that had arisen during the demonstration. We believe this approach would be very beneficial as part of the State of West Virginia’s vendor evaluation process.</p>
Pease Development Authority (New Hampshire)	ERP System Needs Analysis, Requirements Definition, RFP Development, and Procurement (selected vendor – Microsoft Dynamix GP)	<p>Pease Development Authority (PDA) is a quasi-governmental agency comprised of four diverse entities – a trade port, a seaport, a golf course, and an airport. These four entities operate in very different capacities, including as a for-profit entity, a state agency, a landlord, and a transportation provider. Meeting the diverse needs of these four entities proved to be the greatest challenge for this project. As an important step early in the process, BDMP worked with PDA to look at all of the modules that make up traditional ERP solutions and determined which modules were critical and/or desired by the four entities’ operating needs. Early agreement on the scope of PDA’s</p>

Client	Project Description	Lessons Learned
City of Fairfax, Virginia	Business Process Re-engineering Services associated with planned Pentamation upgrade	<p>ERP system needs was critical to defining and maintaining a workable project scope.</p> <p>The City of Fairfax was planning to upgrade its Pentamation software and hired BDMP to evaluate and re-engineer business processes to minimize modifications to the software and build upon best practices supported by the software. The City's willingness to identify business process improvements was an important first step in the process; however, there was resistance among City stakeholders to change the way that work was conducted. This underscored the importance of building in effective communications and change management in order to successfully roll-out the business process modifications across the organization.</p>
Arlington County, Virginia	Enterprise Mainframe Migration Analysis	<p>Arlington County hired BDMP to assist with evaluating how to migrate all of their systems off of their mainframe. A critical factor to the success of this project was listening and actively engaging with stakeholders from across all County departments to understand the current environment, business needs, challenges, and the desired future environment. The close interaction with stakeholders was critical to BDMP's understanding of the County's needs and analysis of alternatives. At the conclusion of the project, the County had tangible, actionable recommendations to guide the migration.</p>

e. Provide a list of employees proposed for this project including employee name, title, and time with the firm, education, employment history, and detail for specific ERP experience.

Table 5 provides a summary of the background and experience for each of our proposed key team members who would work with the State on this project. In addition to our proposed team members, we are able to draw upon the skills and subject matter expertise of other individuals in our firm as needed. Resumes for our named team members are provided at the end of this chapter, which provides a detailed description of each individual's background and experience relative to the State's ERP system planning needs.

Table 5: Proposed Team Members

Name	Title	Years with BDMP	Education	Relevant Employment Experience
Timothy Masse	Principal	18	- BA in Economics, University of New Hampshire - MBA, Bentley College	Tim has 18 years of consulting experience with BDMP and leads BDMP's Government Consulting Practice. He has led BDMP's systems planning, procurement, project management, and quality assurance oversight work with West Virginia's Bureau for Medical Services since 2003. In addition, he has led several of BDMP's government ERP system planning, process improvement, procurement, contract negotiation, and implementation oversight projects, including for the following state agencies: <ul style="list-style-type: none"> • Commonwealth of Massachusetts Human Resources Division • State of New Hampshire Department of Administrative Services • State of Maine Bureau of Accounts and Controls • State of Maryland Judiciary • State of Vermont Department of Information and Innovation Prior to joining BDMP, Tim implemented Dun & Bradstreet's financial software for government agencies.

Name	Title	Years with BDMP	Education	Relevant Employment Experience
Charles Leadbetter	Senior Manager	17	<p>- BA in Computer Science and Economics, University of Maine</p> <p>- Project Management Professional</p>	<p>Charlie has been employed with BDMP since 1983 and is dedicated to serving government clients. He has served as Project Manager for many of our ERP system planning and implementation oversight engagements, including work with the following government agencies:</p> <ul style="list-style-type: none"> • Commonwealth of Massachusetts Human Resources Division • State of New Hampshire Department of Administrative Services • State of Maryland Judiciary • State of Vermont Department of Information and Innovation • City of Toledo, Ohio • City of Newport News, Virginia • City of Richmond, Virginia • Tampa Port Authority <p>Charlie also worked as part of BDMP's team to provide quality assurance services for West Virginia's Medicaid Management Information System implementation.</p>
David Houle	Manager	5	<p>- MS in Management of IT, University of Virginia</p> <p>- BA in International Studies, George Mason University</p> <p>- Certified Process Professional</p>	<p>David joined BDMP in 2005 after five years as Program Manager for eCommerce at the Maryland Technology Development and Corporation. He has broad experience in organizational and business process planning, IT infrastructure planning, and information and communications policy and has worked with government agencies at all levels from local to international. David has served in a lead role on several of BDMP's ERP system engagements, including the following government agencies:</p>

Name	Title	Years with BDMP	Education	Relevant Employment Experience
Charles Snow	Manager	4	<ul style="list-style-type: none"> - BA in Criminology, University of Southern Maine - Associate Degree in Law Enforcement Technology, Southern Maine Technical College - Project Management Professional - Certified Fraud Examiner 	<ul style="list-style-type: none"> • State of New Hampshire Department of Administrative Services • Commonwealth of Massachusetts Human Resources Division • State of Vermont Department of Information and Innovation • City of Newport News, Virginia • City of Fairfax, Virginia <p>Chad joined BDMP in 2006 after seven years working with a vendor of government ERP systems. While employed with an ERP system vendor, Chad provided in-depth demonstrations on ERP applications to prospective government clients, assessed clients' needs, conducted gap-fit analyses, and recommended program modifications to meet the needs of clients.</p> <p>Through his current work with BDMP and his previous employment, he has assisted more than 50 state and local government agencies with planning for and implementing ERP systems. Chad has served in a lead role on several of BDMP's ERP system engagements, including work with the following government agencies:</p> <ul style="list-style-type: none"> • State of New Hampshire Department of Administrative Services • State of Maryland Judiciary • City of Toledo, Ohio • City of Richmond, Virginia • City of Sioux Falls, South Dakota • City of Newport News, Virginia • Tampa Port Authority

Name	Title	Years with BDMP	Education	Relevant Employment Experience
Anita Langley	Senior Consultant	5	<ul style="list-style-type: none"> - MS in Business, Husson University - BS in Accounting, Husson University 	<p>Anita is an experienced consultant and IT systems auditor. She joined BDMP's Consulting Group in 2007 after spending two years conducting financial audits and related accounting services for BDMP's clients. Anita recently assisted the Pease Development Authority, a quasi-governmental authority in the State of New Hampshire, in analyzing its business processes and information systems in preparation for purchasing a new ERP system. In addition, she conducted project health assessments of eight capital IT projects undertaken by the Massachusetts Information Technology Division. She regularly evaluates clients' IT controls and procedures through her work on Statement on Auditing Standards No. 70 (SAS 70) examination projects.</p> <p>Prior to joining BDMP in 2005, Anita worked at a law firm as a public benefits accountant.</p>
Nate Desjardins	Consultant	3	<ul style="list-style-type: none"> - BS in Management of Information Systems, Northeastern University 	<p>Nate is an experienced business and technical analyst with large-scale system implementation expertise. He joined BDMP in 2007 and has assisted several of BDMP's government clients with planning for and implementing new large-scale systems, including developing functional requirements for West Virginia's Medicaid Management Information System (MMIS) re-procurement, providing IV&V services for Massachusetts' PeopleSoft HRD upgrade, conducting an independent evaluation of Vermont's planned PeopleSoft upgrade, and providing IV&V services for Maine's MMIS implementation.</p> <p>Prior to joining BDMP, Nate was employed with the Gillette Company's Global Deployment Division, where he conducted</p>

Name	Title	Years with BDVIP	Education	Relevant Employment Experience
Seth Hedstrom	Consultant	1	- BS in Business Management, Babson College	<p>system testing, deployed hardware and software, conducted technical training, and developed technical documentation.</p> <p>Seth specializes in assisting clients with technology planning, requirements definition, system selection, and implementation oversight. He recently assisted the Maryland Judiciary with selecting a new revenue/cashiering system and is providing independent oversight during the implementation. In addition, he is working with the City of Sioux Falls, South Dakota, to develop requirements for a new ERP system. Seth joined BDMP in 2009 after graduating from Babson College.</p>



In addition to our named project team members, we are able to draw on the expertise of other individuals in our Consulting Group and our firm. Members of our Consulting Group maintain a range of relevant professional certifications, including:

- Certified Computing Professional (CCP);
- Certified Fraud Examiner (CFE);
- Certified Information Systems Auditor (CISA);
- Certified Information Systems Security Professional (CISSP);
- Certified Information Systems Manager (CISM);
- Certified in the Governance of Enterprise IT (CGEIT);
- Certified Ethical Hacker (CEH);
- Certified Public Accountant (CPA);
- Certified Novell Engineer (CNE);
- Certified Process Professional (CPP);
- Microsoft Certified Desktop Support Technician (MCDST);
- Microsoft Certified Professional (MCP); and
- Project Management Professional (PMP).

f. Provide no less than 3 but more than 5 references for similar projects completed by the firm. Include the business name, description of services provided, project dates, contact name, address, and phone number, e-mail address, length of contract, and total amount.

The following pages describe projects led by BDMP's Management and Information Technology Consulting group. We selected these projects for your review to demonstrate the depth and breadth of our consulting firm in conducting ERP system planning and implementation oversight projects for clients in the public sector, as well as our experience working in the State of West Virginia. We would be pleased to provide additional references on request.

As management consultants, we must assure the quality of our services and our work products to preserve our reputation and ensure our long-term viability. We are proud of our record of on time, on budget project performance. We encourage you to contact our references to inquire about our performance and our clients' satisfaction with the services we have provided.



Reference 1: State of New Hampshire Department of Administrative Services

<p>Contact:</p>	<p><i>Mr. Ronald Jobel</i> NH FIRST Contract Manager 25 Capitol Street Concord, New Hampshire 03301 Tel: (603) 271-2260 ronald.jobel@nh.gov</p>
<p>Duration:</p>	<p>Statewide Strategic IT Planning – 2001 to 2002 ERP System Feasibility Study – 2002 to 2003 Quality Assurance Oversight of ERP Implementation – 2007 to 2009</p>
<p>Value:</p>	<p>Statewide Strategic IT Planning – \$230,000 ERP System Feasibility Study – \$133,000 Quality Assurance Oversight of ERP Implementation - \$1,000,000</p>
<p>Project Details:</p>	<p>BDMP has enjoyed a long-standing relationship with the State of New Hampshire on various IT initiatives. In 2001, BDMP facilitated the State’s first Statewide Strategic IT Planning project, which involved defining, planning, and communicating the strategies that would create and sustain an IT environment to support the State’s IT mission, vision, goals, and objectives. The project was designed to serve as a guideline for all levels of state government and to help guide individual agency and statewide IT planning activities for future years.</p> <p>As a follow-up to our strategic technology planning work, BDMP conducted an ERP system feasibility study that explored the State’s existing systems for its Financial, Accounting, and Human Resource functions. During this engagement, we conducted interviews, facilitated group work sessions with representatives from all State agencies, and researched ERP-related initiatives in other states.</p> <p>In January 2007, BDMP was selected to provide Quality Assurance Oversight services during the State’s implementation of the Lawson ERP system. In this role, we worked with the State and the vendor to proactively evaluate implementation activities, identify risks and issues, and develop recommendations for minimizing risk. The State’s ERP system went live on July 6, 2009.</p> <p>Our work with the State of New Hampshire demonstrates BDMP’s experience providing independent oversight of a successful statewide ERP system implementation. In addition, our repeated selection to provide consulting services also demonstrates the State of New Hampshire’s satisfaction with the quality of services provided by BDMP.</p>



Reference 2: Massachusetts Human Resources Division

Contact:	<p>Mr. Darrel Harmer, Director Program Management Office Information Technology Division One Ashburton Place, Room 1601 Boston, MA 02108 Tel: (617) 626 4621 Darrel.Harmer@state.ma.us</p>
Duration:	<p>IT Capital Project Health Assessments – February to March 2009 IV&V for PeopleSoft HRD Upgrade – September 2009 to February 2010</p>
Value:	<p>IT Capital Project Health Assessments – \$127,000 IV&V for PeopleSoft HRD Upgrade – \$251,000</p>
Project Details:	<p>BDMP was engaged in 2009 by Massachusetts' Information Technology Division to perform Project Health Assessments of eight projects funded by the Commonwealth's IT Capital Program. The goal of this project was to assess whether each of the projects were on track and successfully progressing toward achieving their business and technical objectives; were being managed in accordance with project management best practices and utilizing the appropriate control processes and systems; and were still important and needed by the sponsoring agency and the other State project team members and customers. Based on our review of relevant background documentation, interviews with project stakeholders, and analysis of findings, we provided an objective assessment of eight "indicators" to project health for each project, including Project Cost, Project Schedule, Project Scope, Project Risks and Issues, Project Quality, Project Customer Satisfaction, Project Management, and Project Organization and Stakeholder Readiness. Each indicator then received a final rating of High, Medium, or Low Risk.</p> <p>BDMP is currently providing Independent Verification and Validation (IV&V) of the Human Resources Division's PeopleSoft upgrade from version 8.0 to version 9.0. The upgrade represents a significant shift and expansion of the Commonwealth's human resources and payroll functionality. As part of our IV&V services, BDMP conducted an initial assessment of risks and compliance of the PeopleSoft upgrade project, including an analysis of the timeline, proposed system configuration, and compliance approach. In addition, we are providing three point-in-time assessments following the completion of the Construction, Transition, and Deployment phases to evaluate compliance with previous recommendations, identify risks, provide mitigation strategies, and determine readiness to enter the next phase of the implementation.</p>



Reference 3: Maryland Judiciary	
Contact:	<p>Mr. Mark Bittner Enterprise Project Manager Judicial Information Systems 2661 Riva Road Annapolis, MD 21401 Tel: (410) 260-1139 mark.bittner@mdcourts.gov</p>
Duration:	<p>February 2008 to March 2010</p>
Value:	<p>Financial System Planning and Procurement - \$350,000 Independent Verification and Validation - \$174,000</p>
Project Details	<p>The Maryland Judiciary sought the assistance of a qualified consulting firm to work with the Administrative Office of the Courts and District Court Headquarters in the development of a comprehensive strategy and functional requirements for an integrated financial systems solution. The new system will replace the existing cash register and local court accounting systems that currently perform the functions of cash receipt, accounts receivable, invoicing, escrow account management, and detail revenue accounting.</p> <p>The Judiciary hired BDMP in February 2008 to document the "As Is" revenue and local accounting processes and systems; evaluate systems and processes in light of industry best practices; develop functional and technical requirements for a replacement system; identify critical organization and/or process changes needed to implement an effective solution; and assist in the creation of a Request for Proposal (RFP) and proposal evaluation criteria.</p> <p>In July 2009, the Judiciary requested additional assistance from BDMP to provide IV&V services during the implementation of the integrated financial system. In this role, BDMP will monitor vendor and State implementation activities, review vendor deliverables, and provide independent recommendations to promote a successful implementation. BDMP will provide these services through March 31, 2010.</p>



Reference 4: State of Maine Bureau of Accounts and Controls

<p>Contact Information:</p>	<p>Mr. Terry Brann, CPA State Controller Office of the State Controller 14 State House Station Augusta, Maine 04333 Tel: (207) 626-8420 terry.brann@maine.gov</p>
<p>Duration:</p>	<p>1999 to 2002</p>
<p>Value:</p>	<p>\$750,000</p>
<p>Description of Services:</p>	<p>BDMP managed the analysis, requirements gathering, logical and physical design, development, testing, implementation, and transition of Maine’s Oracle-based statewide time and attendance management system. BDMP assisted the State’s project team in reviewing and reconciling applicable laws and documented policies, procedures, and actual practices related to time and attendance, project accounting, federal reporting, accessibility, and accommodation across all participating agencies. The resulting system, known as MS-TAMS, included interfaces to financial and human resource applications as well as enhancements to existing data warehouse and reporting capability.</p> <p>This project represented the first successful development and implementation of an enterprise-wide system, used by all levels of employees in every participating agency, in the State of Maine. The project has been suggested as a model for cross-agency cooperation and implementation of accessible technology. The BDMP project manager was recognized by the Commissioner of the Department of Administrative and Financial Services with a Certificate of Excellence in Project Management.</p> <p>This project required a significant amount of project management, negotiation, and quality assurance oversight, together with an understanding of government accounting and reporting requirements and financial and human resource system functions. We monitored project risks, facilitated meetings with all state agencies and multiple vendors, and guided the project from the initial planning phases through to successful implementation.</p> <p>We believe West Virginia’s ERP system planning project will require a team with extensive experience planning for and managing large-scale implementations. This project for the State of Maine exemplifies our ability to provide the services requested by the State of West Virginia.</p>



Reference 5: State of West Virginia

<p>Contact:</p>	<p><i>Ms. Pat Miller</i> Director, Office of MMIS Operations and IT Support West Virginia Bureau for Medical Services 350 Capitol Street, Room 251 Charleston, West Virginia 25301 Tel: (304) 558-1722 patmiller@wvdhhr.org</p>
<p>Duration:</p>	<p>2003 to 2007 (Quality Assurance and Project Management Services) 2008 to 2011 (MMIS Re-procurement Project Management Services)</p>
<p>Value:</p>	<p>\$2,200,000 (Value of Completed QA Contract) \$3,340,700 (Value of Current Contract)</p>
<p>Project Details:</p>	<p>From 2003 to 2007, BDMP provided Quality Assurance (QA) oversight services for the West Virginia Bureau for Medical Services' (Bureau, BMS) transfer from its mainframe-based Medicaid Management Information System (MMIS) through the implementation and Federal certification of the first fully non-mainframe, Fiscal Agent-based Commercial-off-the-Shelf (COTS) MMIS utilizing a relational database system. In addition, we conducted a point-in-time assessment prior to system "Go live," evaluated the vendor's test plan, developed criteria to evaluate test results, assessed readiness to move the replacement system into production, and conducted a conversion evaluation. During the post-"Go Live" phase, we provided operational performance monitoring and process reviews, including a Monthly Report Card, Impact Statements, Change Management, and Change Request monitoring.</p> <p>In February 2008, BMS selected BDMP to provide MMIS re-procurement planning and project management services. To date, BDMP conducted West Virginia's first MITA State Self-Assessment (SS-A), worked with Bureau stakeholders to develop technical and functional requirements, and led the development of an Advanced Planning Document (APD) and Request for Proposal (RFP) for the re-procurement. We will continue to provide project management through the procurement, implementation, and Federal certification process.</p> <p>In 2009, BDMP conducted an independent IT Security Review for three of the West Virginia Department of Health and Human Resources' major systems.</p> <p>BDMP's repeated selection by the State demonstrates the Bureau's satisfaction with the services provided by BDMP. Having worked in the State since 2003, we have a strong understanding of the State's culture, IT environment, and standards.</p>



TIMOTHY F. MASSE, MBA – PROJECT PRINCIPAL



Tim Masse is a Principal in BDMP's Management and Information Technology Consulting Group. He has been employed with BDMP for 18 years and leads BDMP's Government Consulting practice. He has extensive experience consulting in areas of strategic business and technology planning, ERP system planning and design, project planning, project management oversight, and system implementations. He was formerly employed by Dun & Bradstreet, where he implemented enterprise resource planning solutions for government agencies.

RECENT RELEVANT EXPERIENCE

Project management, quality assurance, and IV&V. Tim has served as project principal for several large-scale system implementation projects for which our consulting team has provided project management and independent project oversight. He is currently leading BDMP's IV&V engagement for Massachusetts' PeopleSoft HRD upgrade. He recently led our independent quality assurance oversight engagements for New Hampshire's statewide ERP system implementation; the City of Richmond, Virginia's, Revenue & Assessment Collection System implementation; and the State of West Virginia's Medicaid Management Information System implementations. In addition, he led BDMP's engagement with the Maine Bureau of Accounts and Control to provide project management for the State's Time and Attendance Management System implementation.

ERP system best practices. Tim has served as project principal for recent engagements with the City of Newport News, Virginia; the City of Toledo, Ohio; the City of Richmond, Virginia; the Town of Leesburg, Virginia; and the Tampa Port Authority to analyze ERP system needs, develop functional and technical requirements for new ERP systems, develop Requests for Proposals, and develop roadmaps to guide clients in the implementation. Tim is knowledgeable of government financial, HR, and procurement practices and the best practices supported by commercial ERP systems.

Business process improvement. Tim has assisted numerous clients in refining processes and operations to improve efficiency. He recently led our engagement with the City of Fairfax, Virginia, as they redesigned their Financial Management and Budget business processes in anticipation of implementing a new software system. He also recently worked with the City of Newport News to document business processes for their revenue assessment and collection activities.

EDUCATION

Bachelor of Arts in Economics, University of New Hampshire

Masters in Business Administration, Bentley College

PROFESSIONAL AFFILIATIONS

Tim has served as co-chairperson of the Electronic Commerce Forum of Maine (EC4ME) and a member of the awards committee for the National Association of State Chief Information Officers (NASCIO). He has also conducted "Redesigning How Government Serves the Public" seminars in Maine and New Hampshire and is an e-Government task force member of the National Electronic Commerce Coordinating Council (NECCC).

**CHARLES LEADBETTER, BA, PMP – SENIOR MANAGER**

Charlie Leadbetter is a Senior Manager in BDMP's Consulting Group. Charlie joined BDMP in February 1993 while completing his Bachelor's Degree at the University of Maine, Orono, where he studied computer science and economics. He is a certified Project Management Professional, a designation of the Project Management Institute.

Charlie has significant experience leading large-scale ERP system planning, assessment, and design projects, developing functional and technical requirements and RFPs, leading system selections, facilitating contract negotiation, and providing independent implementation oversight. In addition, he has developed independent and objective user acceptance test plans and managed large-scale IV&V projects.

RELEVANT EXPERIENCE

Requirements specification and system analysis and design. Charlie has served as project manager on several projects that have included evaluating business needs and developing functional requirements for new ERP systems, including recent work with the Cities of Toledo, Ohio; Richmond, Virginia; Newport News, Virginia; and Tampa Port Authority. He is accustomed to facilitating Joint Requirements Planning (JRP) work sessions with various system stakeholders to identify desirable current and future system functionality that needs to exist in the future environment.

Quality assurance/IV&V. Charlie is currently providing IV&V services for the Commonwealth of Massachusetts' PeopleSoft HRD upgrade. In addition, he served as Project Manager for BDMP's engagement to provide Quality Assurance services for New Hampshire's statewide ERP implementation from January 2007 to July 2009, which involved leading a team of eight BDMP analysts, managing the BDMP project plan and schedule, identifying project risks and issues, developing a monthly status report and reporting methodology, and working diligently to create an effective team between the implementation vendor, the State, and BDMP.

Independent Reviews. Charlie recently led two independent reviews for the State of Vermont in relation to their planned PeopleSoft upgrade from v8.8 to 9.X. The first project involved an evaluation of proposed PeopleSoft Program Management Services. The second project evaluated a proposed PeopleSoft Implementation and Upgrade Partner Project. Both projects involved reviewing project documentation, evaluating risks, and providing recommendations to mitigate risks should the State decide to proceed with the preferred vendor.

Strategic technology planning for public sector clients. Charlie has worked with numerous local and state organizations to develop long-range strategic technology plans, including the State of New Hampshire's first statewide strategic technology plan. These projects involved diverse groups of stakeholders, facilitating collaborative planning meetings, documenting and improving business processes, and developing on-going governance models for future plan updates.



DAVID HOULE, MS, CPP – MANAGER

David Houle is a Manager in our firm's Management and Information Technology Consulting Group. David joined the firm's Portland office after five years as the Program Manager for eCommerce at the Maryland Technology Development Corporation (TEDCO). He has broad experience in organizational and business process planning, strategic technology planning, IT infrastructure planning, and information and communications policy, and has worked with not-for-profit and government agencies at all levels from local to international.

RELEVANT EXPERIENCE

Assessing ERP applications for government agencies. David has assisted clients in the Cities of Newport News, Virginia and Toledo, Ohio to evaluate their enterprise system needs, document current processes, develop technical and functional requirements, identify prospective system vendors, and provide recommendations to guide the clients in selecting and implementing a new system.

IV&V. As Assistant Project Manager and Lead Consultant for BDMP's engagement with the State of New Hampshire from 2007 to 2009, David provided IV&V services for the State's implementation of Lawson's ERP software. As part of this project, David evaluated the vendor's performance, reviewed vendor deliverables, identified potential risks, developed recommendations for mitigating risks, and communicated project status to State stakeholders. Project status reports were designed to provide stakeholder groups with a "snapshot" of project health.

Independent Assessments. David has conducted two of BDMP's recent independent assessments of projects related to the State's planned PeopleSoft upgrade from v8.8 to v9.X for the Vermont Office of the CIO. These projects involved evaluating vendors' proposed project costs, implementation plans, staffing resources, and project management approach; identifying potential risks; conducting a cost/benefit analysis; and developing recommendations to promote a successful implementation. David also served in a lead role for BDMP's engagement with the Massachusetts ITD to conduct project health assessments of eight capital IT projects.

Project management. David has served as project manager for several state, local, and higher education consulting engagements. In this role, he developed and maintained project planning documents, communicated project status with the client, and oversaw the development of all project deliverables.

Business process improvement. David is a Certified Process Professional, the only nationally recognized certification in business process management. He has assisted several government clients in documenting "as is" business processes and developing recommendations for process improvements in conjunction with planning for new or enhanced technologies.

EDUCATION

Master of Science in Management of Information Technology, University of Virginia
Bachelor of Arts in International Studies, George Mason University, Fairfax, Virginia



CHARLES D. SNOW, PMP, CFE – MANAGER

Chad Snow is a Manager in BDMP's Management and Information Technology Consulting Group. He has extensive experience with project management, large-scale system planning, business process improvement, system implementation and design, and change management for public sector ERP systems. Chad stays abreast of developments impacting government agencies through his membership in the Government Finance Officers Association (GFOA) and participation in government organizations. He regularly writes articles for national publications, such as the *American City and County Magazine*.

RECENT RELEVANT EXPERIENCE

Project management and implementation oversight. Chad has provided project management and implementation oversight of several large system implementations. He served in a lead quality assurance oversight role for New Hampshire's statewide ERP system implementation. In addition, he served as project manager for the City of Richmond, Virginia's revenue and assessment collection system implementation. He is currently managing BDMP's implementation oversight project for the Maryland Judiciary's revenue system implementation. Prior to joining BDMP in 2006, Chad was employed by a former ERP systems vendor (MUNIS), where he managed system implementations for more than 25 local government clients across the country.

Knowledge of ERP systems. Chad worked with the Cities of Toledo, Ohio; Newport News, Virginia; and Richmond, Virginia; and the Town of Leesburg, Virginia, in assessing their financial/ERP system needs, including understanding the clients' goals for a proposed integrated system, developing system requirements, identifying prospective vendor systems, and providing information to guide the clients' in implementing a new solution. While employed by MUNIS, Chad provided in-depth demonstrations on ERP applications to prospective government clients. In addition, he assessed clients' needs, conducted gap-fit analyses, and recommended program modifications to meet the needs of clients.

Business process improvement. Chad conducted workflow analysis and business process redesign projects for the Cities of Richmond and Fairfax, Virginia. These projects involved working with City departments to identify solutions to address documented issues, developing recommendations for business process and organizational changes, and developing implementation plans for the restructuring of existing workflows and business processes in order to make best use of the skills of the staff and existing information systems. He has also assessed business process and workflow for several municipalities and county governments as they considered moving to new automated ERP systems.

EDUCATION AND CERTIFICATIONS

Bachelor of Arts in Criminology, University of Southern Maine

Associate Degree in Law Enforcement Technology, Southern Maine Technical College

Certified Fraud Examiner

Project Management Professional



ANITA S. LANGLEY, MS – SENIOR CONSULTANT

Anita Langley is a Senior Consultant in our Management and Information Technology Consulting Group. She assists clients in business analysis, planning, application and organizational needs assessments, system selection, and implementation of information systems. Anita also provides information assurance services, including Sarbanes-Oxley (SOX) 404 testing and Statement on Auditing Standards (SAS) 70 examinations for a variety of clients in the public and private sector. Prior to joining BDMP in 2005, Anita worked at a law firm as a public benefits accountant.

RECENT RELEVANT EXPERIENCE

ERP system planning. Anita recently assisted the Pease Development Authority, a quasi-governmental authority in the State of New Hampshire, in analyzing its business processes and information systems in preparation for purchasing a new enterprise financial system. As part of this project, Anita researched potential vendors for the Authority and assisted with RFP development and the procurement process.

Technology planning and organizational assessment. Anita has assisted BDMP project teams in evaluating government agencies' information systems and operational needs, conducting best practice research of peer organizations and vendor systems, and planning for the implementation of new technologies. For example, she conducted project health assessments of eight capital IT projects undertaken by the Commonwealth of Massachusetts Information Technology Division to evaluate risks and provide recommendations to promote the success of these large-scale initiatives.

Information assurance services. Anita has provided information assurance services, including conducting SOX 404 testing and Statement on SAS 70 examinations for a variety of clients in the public and private sector including insurance agencies and financial institutions among others. The projects have involved performing test procedures, observing controls, and preparing documentation for inclusion in reports.

Audit and accounting. As part of BDMP's audit group, Anita conducted audits of insurance agencies and employee benefit plans, including reviewing claims receivable and outstanding claims.

Knowledge of IT best practices. Anita has researched and evaluated technology issues to assess feasibility, cost, and impact to business and documented findings and recommendations for BDMP senior management.

EDUCATION

Master of Science in Business, Husson College

Bachelor of Science in Accounting, Husson College



NATE DESJARDINS, BS— BUSINESS AND TECHNICAL ANALYST

Nate DesJardins is a Consultant in BDMP's Management and Information Technology Consulting Group. He is an experienced technical analyst with large-scale system implementation expertise. Nate has conducted system testing, assisted in the deployment of global applications, deployed hardware and software, conducted technical training, and developed technical documentation.

RECENT RELEVANT EXPERIENCE

Technical Analysis and Testing. Nate is currently providing IV&V services for Commonwealth of Massachusetts' PeopleSoft HRD upgrade and the State of Maine's Medicaid Management Implementation System (MMIS) implementation, which involves reviewing and monitoring the vendor's project plan, deliverables, and services; identifying potential risks; and developing recommendations for mitigation of risks. In addition, he conducted an independent evaluation of Vermont's planned PeopleSoft upgrade prior to the State's execution of a contract. While employed with the Gillette Company's Global Deployment division, Nate tested and implemented package releases prior to global deployments. In addition, he deployed offsite hardware/software upgrade stations, strengthened cost/benefit analyses by evaluation of spyware removal tools, and assisted in the rollout of applications to 33,000 users world-wide.

Technology Planning and Requirements Definition. Nate assisted the West Virginia Bureau for Medical Services in developing requirements for its MMIS re-procurement. In addition, he assisted the Westchester County Office of the County Clerk to with the development of a strategic technology plan to guide future technology initiatives. As part of this project, he has facilitated fact-finding interviews and work sessions with County personnel, conducted best practice research, and developed recommendations that are in alignment with the County's goals and objectives.

Training and Documentation. Nate trained Level I Discovery Channel representatives, managed problem transactions, analyzed strategic product goals, and produced in-depth technical and business documentation while providing technical support for the Discovery Channel.

EDUCATION

Bachelor of Science in Management Information Systems, Northeastern University

TECHNICAL SKILLS

Networking: Wireless, Microsoft & Novell Networks, DHCP, DNS, TCP/IP, FTP, 10/100

Applications: Checkpoint SecuRemote, Microsoft Suite, FrontPage, Lotus: Notes (R5 and R6) & 123, Norton: Ghost & Antivirus, Bloomberg, Nomad, Rumba 2000 Mainframe, Adobe Acrobat Writer

Administrative: Wise Wrapper, IBM Tivoli Management, Symantec: Antivirus & PcAnywhere, Lotus Sametime, Microsoft Systems Management



SETH HEDSTROM, BS – BUSINESS AND TECHNICAL ANALYST

Seth Hedstrom is a Consultant in our Management and Information Technology Consulting Group. He specializes in assisting clients with technology planning, organizational needs assessments, system selection, and the implementation of information systems. He focuses on providing technology-related consulting services to public sector agencies.

RECENT RELEVANT EXPERIENCE

Knowledge of ERP system best practices. Seth assisted BDMP's team in analyzing vendor proposals and selecting a Court Revenue Collection System for the Maryland Judiciary. He is currently providing independent project oversight during the implementation of the selected vendor's solution. In addition, Seth is assisting the City of Sioux Falls, South Dakota with planning for its ERP system replacement.

Knowledge of IT best practices. Seth recently conducted a strategic technology planning project for the Town of Wayland, Massachusetts, which involved working with Town personnel to evaluate strengths and challenges in the current environment and identifying strategic opportunities for the use of technology over a five-year planning horizon. As part of this project, Seth evaluated the feasibility, cost, and impact of technologies and associated business processes and the anticipated return on investment for the Town.

Calculation and analysis of efficiency increases through change management. Seth has experience using forecasting and analysis tools to understand the financial implications of a major business process modification. This experience allows him to fully quantify the benefits in relation to cost for clients considering implementing new technologies.

Needs assessment and preliminary planning for system implementation. Seth has experience evaluating operational needs as well as conducting best practice research of peer organizations, developing surveys, and making recommendations in planning for the implementation of new technologies.

Organizational behavior studies related to technology management. Seth has participated in multiple studies to better understand the impact of changes in technology systems on client groups which included observation of implementations in various companies, to understand the factors of a successful system adoption.

EDUCATION

Bachelor of Science in Business Management, Babson College



APPENDIX A: SIGNED DOCUMENTATION

On the following pages, we have provided the following signed documentation:

- Cover Pages from the Expression of Interest
- Addendum 1
- Proposal Affidavit



State of West Virginia
 Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

Request for Quotation

RFQ NUMBER
 FAR106065

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 1

ADDRESS CORRESPONDENCE TO ATTENTION OF:
 KRISTA FERRELL
 304-558-2596

Maret Freeman, Manager
New Business Development
Berry, Dunn, McNeil & Parker
100 Middle Street
Portland, Maine 04104

DEPARTMENT OF ADMINISTRATION
 FINANCIAL ACCOUNTING AND
 REPORTING SECTION
 2101 WASHINGTON ST E
 CHARLESTON, WV
 25305-1510 304-558-4083

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
11/23/2009				

WINNING DATE: 12/30/2009 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
	1	LS		906-29		
<p>SOFTWARE ENGINEERING SERVICES FOR ERP</p> <p>EXPRESSION OF INTEREST (EOI)</p> <p>THE WEST VIRGINIA DIVISION OF PURCHASING FOR THE AGENCY, THE WEST VIRGINIA DIVISION OF ADMINISTRATION'S DIVISION OF FINANCE IS SOLICITING EXPRESSIONS OF INTEREST FOR SOFTWARE ENGINEERING, CONSULTING, AND PROJECT MANAGEMENT SERVICES FOR AN ENTERPRISE RESOURCE PLANNING SYSTEM PER THE ATTACHED.</p> <p>TECHNICAL QUESTIONS CONCERNING THIS EXPRESSION OF INTEREST MUST BE SUBMITTED IN WRITING TO KRISTA FERRELL IN THE WEST VIRGINIA STATE PURCHASING DIVISION VIA MAIL AT THE ADDRESS SHOWN IN THE BODY OF THIS EOI, VIA FAX AT 304-558-4115, OR VIA EMAIL AT KRISTA.S.FERRELL@WV.GOV. DEADLINE FOR ALL TECHNICAL QUESTIONS IS MONDAY, DECEMBER 14, 2009 AT THE CLOSE OF BUSINESS. ALL TECHNICAL QUESTIONS RECEIVED, IF ANY, WILL BE ANSWERED BY ADDENDUM AFTER THE DEADLINE HAS LAPSED.</p> <p>QUESTIONS CONCERNING THE PROCESS BY WHICH A VENDOR MAY SUBMIT AN EXPRESSION OF INTEREST TO THE STATE OF WEST VIRGINIA ARE NOT CONSIDERED TO BE TECHNICAL QUESTIONS AND MAY BE SUBMITTED AT ANY TIME PRIOR TO THE EOI OPENING AND IN ANY FORMAT.</p>						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

Principal: *Timothy A. Blasse* TELEPHONE: 207-541-2323 DATE: 01/05/2010
 FEIN: 01-0523282 ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'



State of West Virginia
 Department of Administration
 Purchasing Division
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1

ADDRESS CORRESPONDENCE TO ATTENTION OF
KRISTA FERRELL
304-558-2596

VENDOR

Berry Dunn McNeil & Parker
P O Box 1100
Portland, ME 04104-1100

SHIP TO

DEPARTMENT OF ADMINISTRATION
 FINANCIAL ACCOUNTING AND
 REPORTING SECTION
 2101 WASHINGTON ST E
 CHARLESTON, WV
 25305-1510 304-558-4083

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
12/22/2009				

OPENING DATE: **01/06/2010** BID OPENING TIME **01:30PM**

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
				ADDENDUM NO. 1		
				THIS ADDENDUM IS ISSUED TO:		
				1.) ANSWER ALL TECHNICAL QUESTIONS SUBMITTED AND ACCEPTED IN ACCORDANCE WITH THE PROVISIONS OF REQUEST FOR QUOTATION FAR106065,		
				2.) REPLACE THE PURCHASING AFFIDAVIT FORM WITH THE ATTACHED PURCHASING AFFIDAVIT FORM,		
				3.) REPLACE THE STANDARD TERMS AND CONDITIONS WITH THE ATTACHED TERMS AND CONDITIONS, AND		
				4.) TO EXTEND THE BID OPENING DATE.		
				BID OPENING DATE IS EXTENDED TO: 01/06/2010		
				BID OPENING TIME REMAINS: 1:30 PM		
				***** END ADDENDUM NO. 1 *****		
1	1	LS		906-29		
				SOFTWARE ENGINEERING SERVICES FOR ERP		

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

PURCHASER: *Tom A. Mason* TELEPHONE: **207-541-2323** DATE: **01/05/2010**
 PRINCIPAL: *Tom A. Mason* FEIN: **01-0523282** ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'



State of West Virginia
 Department of Administration
 Purchasing Division
 2019 Washington Street East
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 Charleston, WV 25305-0130

Request for Quotation

RFQ NUMBER
FAR106065

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2

ADDRESS CORRESPONDENCE TO ATTENTION OF
KRISTA FERRELL
304-558-2596


RFQ COPY

TYPE NAME/ADDRESS HERE

DEPARTMENT OF ADMINISTRATION
 FINANCIAL ACCOUNTING AND
 REPORTING SECTION
 2101 WASHINGTON ST E
 CHARLESTON, WV
 25305-1510 304-558-4083

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
11/23/2009				

ENDING DATE: **12/30/2009** BID OPENING TIME **01:30PM**

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
				REQUISITION NO.: FAR106065		
				EXHIBIT 10		
				ADDENDUM ACKNOWLEDGEMENT		
				I HEREBY ACKNOWLEDGE RECEIPT OF THE FOLLOWING CHECKED ADDENDUM(S) AND HAVE MADE THE NECESSARY REVISIONS TO MY PROPOSAL, PLANS AND/OR SPECIFICATION, ETC.		
				ADDENDUM NO. S:		
				NO. 1 <input checked="" type="checkbox"/>		
				NO. 2 <input type="checkbox"/>		
				NO. 3 <input type="checkbox"/>		
				NO. 4 <input type="checkbox"/>		
				NO. 5 <input type="checkbox"/>		
				I UNDERSTAND THAT FAILURE TO CONFIRM THE RECEIPT OF THE ADDENDUM(S) MAY BE CAUSE FOR REJECTION OF EOIS.		
				VENDOR MUST CLEARLY UNDERSTAND THAT ANY VERBAL REPRESENTATION MADE OR ASSUMED TO BE MADE DURING ANY ORAL DISCUSSION HELD BETWEEN VENDOR'S REPRESENTATIVES AND ANY STATE PERSONNEL IS NOT BINDING. ONLY THE INFORMATION ISSUED IN WRITING AND ADDED TO THE SPECIFICATIONS BY AN OFFICIAL ADDENDUM IS BINDING.		
				 SIGNATURE		

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

<i>[Signature]</i>	TELEPHONE 207-541-2323	DATE 01/05/2010
FEBN 01-0523282	ADDRESS CHANGES TO BE NOTED ABOVE	

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'



State of West Virginia
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 Charleston, WV 25305-0130

Request for Quotation

RFQ NUMBER
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KRISTA FERRELL
304-558-2596

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 CHARLESTON, WV
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DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
11/23/2009				

OPENING DATE: **12/30/2009** BID OPENING TIME **01:30PM**

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
				<i>Berry, J. Dunn, McNeil & Parker</i> COMPANY		
				<i>...01/05/2010.....</i> DATE		
<p>NOTE: THIS ADDENDUM ACKNOWLEDGEMENT SHOULD BE SUBMITTED WITH THE EOI.</p> <p>REV. 09/21/2009</p> <p>BANKRUPTCY: IN THE EVENT THE VENDOR/CONTRACTOR FILES FOR BANKRUPTCY PROTECTION, THE STATE MAY DEEM THE CONTRACT NULL AND VOID, AND TERMINATE SUCH CONTRACT WITHOUT FURTHER ORDER.</p> <p>NOTICE</p> <p>A SIGNED EOI MUST BE SUBMITTED TO:</p> <p>DEPARTMENT OF ADMINISTRATION PURCHASING DIVISION BUILDING 15 2019 WASHINGTON STREET, EAST CHARLESTON, WV 25305-0130</p> <p>THE EOI SHOULD CONTAIN THIS INFORMATION ON THE FACE OF THE ENVELOPE OR THE EOI MAY NOT BE CONSIDERED:</p> <p>SEALED EOI</p>						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

Principal *[Signature]* TELEPHONE **207-541-2323** DATE **01/05/2010**
 FEIN **01-0523282** ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'



State of West Virginia
 Department of Administration
 Purchasing Division
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 Charleston, WV 25305-0130

Request for Quotation

RFQ NUMBER
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 KRISTA FERRELL
 304-558-2596

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 CHARLESTON, WV
 25305-1510 304-558-4083

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
11/23/2009				

OPENING DATE: 12/30/2009 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
BUYER:				KRISTA FERRELL-FILE 21		
EOI. NO.:				FAR106065		
EOI OPENING DATE:				12/30/2009		
EOI OPENING TIME:				1:30 PM		
PLEASE PROVIDE A FAX NUMBER IN CASE IT IS NECESSARY TO CONTACT YOU REGARDING YOUR EOI:						
----- 207-541-2323 -----						
CONTACT PERSON (PLEASE PRINT CLEARLY):						
----- Timothy F. Masse -----						
***** THIS IS THE END OF RFQ FAR106065 ***** TOTAL:						N/A

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

Principal		TELEPHONE	DATE
01-0523282		207-541-2323	01/05/2010
ADDRESS CHANGES TO BE NOTED ABOVE			

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'

RFQ No. FAR106065

STATE OF WEST VIRGINIA
Purchasing Division

PURCHASING AFFIDAVIT

West Virginia Code §5A-3-10a states: No contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and the debt owed is an amount greater than one thousand dollars in the aggregate.

DEFINITIONS:

"Debt" means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.

"Debtor" means any individual, corporation, partnership, association, limited liability company or any other form or business association owing a debt to the state or any of its political subdivisions. "Political subdivision" means any county commission; municipality; county board of education; any instrumentality established by a county or municipality; any separate corporation or instrumentality established by one or more counties or municipalities, as permitted by law; or any public body charged by law with the performance of a government function or whose jurisdiction is coextensive with one or more counties or municipalities. "Related party" means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceeds five percent of the total contract amount.

EXCEPTION: The prohibition of this section does not apply where a vendor has contested any tax administered pursuant to chapter eleven of this code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

Under penalty of law for false swearing (*West Virginia Code §61-5-3*), it is hereby certified that the vendor affirms and acknowledges the information in this affidavit and is in compliance with the requirements as stated.

WITNESS THE FOLLOWING SIGNATURE

Vendor's Name: Timothy F. Masse Berry Dunn McNeil & Parker

Authorized Signature: [Signature] Date: 1/5/09
10 M M M
T M

State of Maine

County of Amberland, to-wit:

Taken, subscribed, and sworn to before MARY M. MILLS Notary Public, Maine, January, 2010.

My Commission expires December 24, 2010, 2010.

AFFIX SEAL HERE

NOTARY PUBLIC [Signature]