



CERTIFIED PUBLIC ACCOUNTANTS
MANAGEMENT CONSULTANTS

January 20, 2009

Ms. Jo Ann Adkins
Purchasing Division
2019 Washington Street, East
P.O. Box 50130
Charleston, WV 25305-0130

Dear Ms. Adkins:

Berry, Dunn, McNeil & Parker (BDMP) is pleased to submit this proposal in response to the State of West Virginia's Request for Quotation (RFQ) # ITECH10: Statewide Contract for Technical Services. We have read the RFP and Addenda, we understand them, and we agree to the terms and conditions stated therein.

We have proposed providing **independent project-based services** for the following categories:

- Technology Advisory Services
- Major Project Implementation (Including Project Management)
- Project Quality Assurance Review and Associated Services

BDMP is a management consulting and certified public accounting firm headquartered in Portland, Maine serving clients nationally. Our Public Sector Consulting practice is dedicated to serving the management and information technology needs of state and local government agencies. We have been providing consulting services to the State Bureau for Medical Services since 2004 and would enjoy the opportunity to work with additional agencies across the State.

Enclosed are one (1) original and two (2) copies of our proposal for the State's review. Our proposal remains binding for a minimum of 180 days from the proposal opening date.

As a Principal of this firm and the leader of our Public Sector Consulting practice, I am legally authorized to commit BDMP to the work proposed herein. Should you or the Evaluation Committee have questions regarding our proposal, you may contact me directly at (207) 541-2323 or via email at tmasse@bdmp.com.

Sincerely,

A handwritten signature in black ink that reads "Timothy F. Masse".

Timothy F. Masse
Principal

100 Middle Street, PO Box 1100, Portland, ME 04104-1100
Phone (207) 775-2387 Fax (207) 774-2375
www.bdmp.com

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PURCHASING DIVISION
STATE OF WV



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PROPOSAL REQUIREMENTS MATRIX

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

Requirement	Requirement Location	BDMP Complies	Response Section
Cover Letter	Section 1.6	Yes	Cover Letter
Table of Contents	Section 1.6	Yes	Table of Contents
Section I – Corporate Description	Section 1.6	Yes	Section I
Section II – Qualification and Experience of the Company in Supplemental Staffing Contracts	Section 1.6	Yes	Section II
Section III – Qualifications and Experience of the Company for each of the 15 Service Categories Described in Attachments 2-16	Section 1.6	Yes	Section III
Addendum Acknowledgement Form	Exhibit 10	Yes	Section IV
Signed Addendum 1	Addendum 1	Yes	Section IV
Signed Addendum 2	Addendum 2	Yes	Section IV
Signed Addendum 3	Addendum 3	Yes	Section IV
Completed Page 5 of RFQ	Page 5 of RFQ	Yes	Section IV
Vendor Preference Form	Page 17 of RFQ	Not Applicable	Not Applicable
Purchasing Affidavit	Page 36 of RFQ	Yes	Section IV



SECTION I – CORPORATE DESCRIPTION

1.1 Requested Corporate Information

Firm Name: Berry, Dunn, McNeil & Parker

Firm Address: 100 Middle Street
Portland, Maine 04104

Telephone Number: (207) 775-2387

Fax Number: (207) 774-2387

Federal Tax ID Number: 01-0523282

Date Established: 1974

Number of Full-Time Employees: 200

1.2 Firm Contact Information

Primary Contact: Timothy F. Masse, Principal

Contact Address: Berry, Dunn, McNeil & Parker
100 Middle Street
Portland, Maine 04104

Telephone Number: (207) 541-2323

Fax Number: (207) 774-2387

E-mail Address: tmasse@bdmp.com



1.3 Narrative Description of Firm History and Resources

Berry, Dunn, McNeil & Parker (BDMP) is a national management consulting and certified public accounting firm, headquartered in Portland, Maine, and serving clients nationally. We were formed in 1974 with nine professionals and have experienced sustained growth throughout our 35-year history. Today, BDMP is one of the largest locally-owned and controlled management consulting and certified public accounting firms based in New England. We have approximately 200 personnel, with offices in Portland and Bangor, Maine; Boston, Massachusetts; and Manchester, New Hampshire. The firm is a Limited Liability Company (LLC) with 33 principals.

We provide a full range of services to our clients, including management consulting services, information technology consulting services, audit and accounting services, and tax services. We have worked in 40 states throughout the United States and in New Brunswick and Quebec, Canada, as shown on the map below.

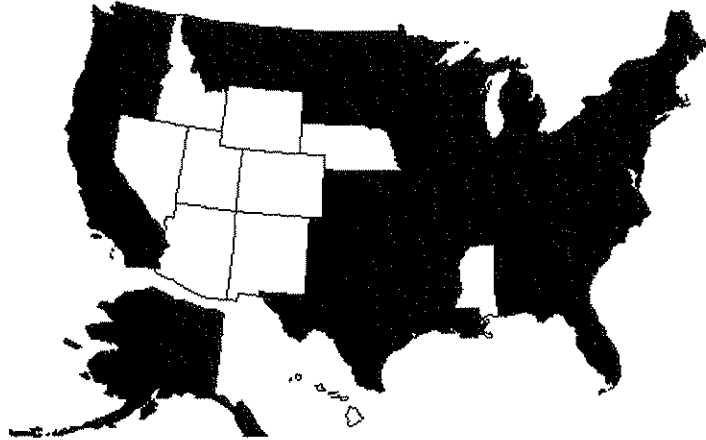


Exhibit A: Map of BDMP Clients Served

We do not sell computer software or hardware, nor do we implement systems. We do not maintain partnerships with vendors that could impair our independence. If selected to work with the State, we will provide objective recommendations that are only in the State's best interests.

Our Public Sector Commitment

BDMP's Public Sector Consulting practice focuses on serving the needs of state and local government agencies. We participate in several industry groups/associations, including NASCIO (National Association of State Chief Information Officers); NECCC (National Electronic Commerce Coordinating Council); FirstGov; and several local government associations, state special interest groups, and the International County/City Managers Association (ICMA). Our participation in these groups helps us to stay abreast of current topics and issues affecting our public sector clients.

Since the inception of our management and technology consulting practice in 1986, we have worked with over 125 state and local government agencies. In Table 1, on the following page, we have provided a representative list of clients for whom we have provided relevant consulting services to those being sought by the State.


Table 1: Representative BDMP Client Engagements

Project	Clients
Independent Review of Processes, Procedures, and/or Information Systems	<ul style="list-style-type: none"> • Arlington County, Virginia • City of Orlando, Florida • Illinois State Board of Education Internal Audit Department • State of Maine Bureau of Motor Vehicles • State of Maine Office of the Chief Information Officer • State of North Carolina Office of the State Auditor • State of Vermont Office of the Chief Information Officer
Independent Verification & Validation of System Implementation	<ul style="list-style-type: none"> • Appalachian Trail Conservancy (Fundraising Application) • City of Richmond, Virginia (Revenue and Assessment System) • Maryland Judiciary (Revenue and Collection System) • State of New Hampshire Department of Administrative Services (Enterprise Resource Planning System) • State of New Hampshire Department of Health & Human Services (Medicaid Decision Support System)
Quality Assurance Oversight of System Implementation	<ul style="list-style-type: none"> • State of West Virginia Bureau for Medical Services (Medicaid Management Information System implementation)
Requirements Definition and System Planning	<ul style="list-style-type: none"> • City of Newport News, Virginia • City of Toledo, Ohio • Maine Bureau of Accounts and Control • Maine Bureau of Motor Vehicles • Massachusetts Department of Public Health • Tampa Port Authority • Town of Leesburg, Virginia
Strategic Technology Planning	<ul style="list-style-type: none"> • City of Alpharetta, Georgia • City of Concord, New Hampshire • City of Dover, Delaware • City of Greenville, South Carolina • City of Portage, Michigan • City of Port Orange, Florida • City of Saco, Maine • City of Suffolk, Virginia • City of Weymouth, Massachusetts • Kent County, Delaware • Scott County, Iowa • State of New Hampshire • Westchester County, New York



Seth Hedstrom, BS, is a Consultant in our firm who specializes in assisting clients with organizational assessments, technology planning, system selection, and the implementation of information systems. 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. He has participated in multiple studies to better understand the impact of changes in technology systems on client groups and has researched and evaluated technology issues to assess feasibility, cost, and impact to business. Seth earned his B.S. degree in Business Management from Babson College.



Tony Marchetti, BS, is a Technical Analyst and Database Administrator with over seven years of experience working in IT in various capacities, including IT Management, System Administration, Network Administration, and PC Support. Prior to joining BDMP, Tony served as an IT Manager for Devine Tarbell and Associates, a renewable energy consulting firm, where he provided database administration, maintenance, backup/recovery, and turning of several application databases, including MS Dynamics GP, MS Office SharePoint Server 2007, and EMC EmailXtender. In this role, Tony also managed day-to-day network operations including system troubleshooting and end user support for nine locations and approximately 300 workstations and servers.

Tony earned his B.S. degree in Management Information Systems from the Rochester Institute of Technology in Rochester, New York.



SECTION II – QUALIFICATIONS AND EXPERIENCE (SUPPLEMENTAL STAFFING)

BDMP is not proposing services and resources in the supplemental staffing category of this contract.



SECTION III – QUALIFICATIONS AND EXPERIENCE (SERVICE CATEGORIES)

BDMP is proposing independent project-based services for the following categories:

- Technology Advisory Services
- Major Project Implementations (Including Project Management)
- Project Quality Assurance Review and Associated Services

In the paragraphs below, we have provided a description of BDMP's approach to planning for and managing engagements, which would apply to each of these three service categories. Following this general description, we have provided the requested information for each of the service categories.

3.1 Project Approach and Methodology

We understand that the State is seeking to pre-qualify firms to provide relevant consulting services, with actual tasks and timelines to be determined on a project-by-project basis. When the State issues a project request, BDMP will develop a proposed Workplan that includes our approach to conducting the project, specific tasks to be conducted, personnel assigned to the project, an estimated timeline, project fees, and other information based on the needs of the specific project.

Assigning Resources

Our consulting team includes a diverse group of individuals possessing a wide range of skills and experience from which to draw. When we receive a request to conduct work, we consider the nature of the work to be conducted, the level of commitment requested (e.g., full-time, part-time), and the duration of the project in our determination of staff assignments. Each project is led by an experienced Project Manager and overseen by an Engagement Principal from our Management and Information Technology Consulting Group.

Analyzing and Planning for Tasks

While we have several proven methodologies that we apply to our consulting projects, our experience has shown that each consulting project is unique. We pride ourselves on developing a custom approach to each project that is carefully tailored to the needs of our client and the specific project tasks at hand. While our project tasks may adjust to meet the needs of our clients, our consultants' dedication to client service and our firm's quality assurance procedures do not waiver.

On-site and Off-site Work

Our project team will work on-site at the State's offices and from our firm headquarters in Portland, Maine, as determined based on the needs of each project. We regularly conduct work for clients throughout the United States. Of particular relevance to the State of West Virginia, we have conducted work with the State Bureau for Medical Services since 2004 and are able to easily access the region through air travel and be responsive to the State's needs.



We have been able to effectively bridge distance gaps by planning an appropriate amount of on-site work for the needs of the client and project, and through the use of teleconferencing and Web-based project management tools. Additionally, all of our consultants are provided with the necessary technology to enable them to work effectively regardless of their location. We encourage the Evaluation Committee to ask our references about our on-site commitment and our responsiveness to client and project needs.

3.2 Project Management and Execution of Tasks

Our primary objective in managing project tasks is to maximize project success and minimize risk. We do this by monitoring resources, project milestones, completion of deliverables, and communication with project team members and client stakeholders.

Project Management Lifecycle

We apply proven project management and quality assurance processes based on Project Management Institute (PMI) principles and scale them to fit the specific needs of each project. Our approach includes applying standard processes across the project management lifecycle. Our clients have leveraged our professional project management experience by repeatedly selecting members of our project team to perform independent point-in-time assessments, assist project recovery initiatives, and facilitate the adoption and integration of best practices through project management mentoring. In all cases, we apply proven project management processes from the Project Management Book of Knowledge (PMBOK), published by the Project Management Institute, to complement a variety of system development methodologies.

The following paragraphs describe the specific steps we will undertake through each phase of the Project Management Lifecycle:

Project Initiation: Project initiation is signaled by acceptance of our Workplan and successful negotiation of a contract. Based upon existing documentation, terms of the contract, and additional input from the State, the BDMP Project Manager will create a draft Project Charter and Plan. The Charter will clearly define the scope of the project, document project influences, and identify project stakeholders. The Plan will detail roles and responsibilities and outline processes for management of project scope, communication, quality, resources, and risks. Together, the Charter and Plan specify what will be delivered and how we intend to deliver it.

Project Planning: Planning is not a one-time task, but an ongoing project management process. It entails identification and integration of tasks, estimation of effort and/or duration, leveraging of resources, and development of strategies to mitigate any significant project risks. Project meetings and work sessions are planned to meet specified objectives and make best use of attendees' time and expertise.

Throughout the course of each engagement, BDMP's Project Manager will apply knowledge, skills, tools, and techniques to monitor project activities, deliverables, resources, communication, and overall project quality against the specifications agreed



upon in the Project Plan. The Project Manager will regularly review the project schedule and make updates as needed. These are typically presented in conjunction with status meetings with the client's management team.

Project Execution and Control: Throughout the course of each engagement, BDMP's Project Manager will conduct the following activities:

- Monitor and manage project risks;
- Facilitate the timely resolution of issues important to the project's progress;
- Monitor representation to help ensure appropriate participation in key decisions;
- Facilitate necessary knowledge transfer;
- Coordinate the activity of resources required by the project;
- Coordinate review of deliverables for compliance with specifications, standards, laws, regulations, and policies;
- Conduct scheduled meetings and work sessions;
- Monitor and report project status;
- Identify, assign, and track action items; and,
- Maintain a project schedule and Gantt chart.

We have established processes, tools, and techniques for the management of projects to achieve project success. We closely monitor the project timeline, project tasks, resources, milestones, and deliverables so that we are able to identify deviations (or potential deviations) and keep projects as closely on track as originally agreed upon in the Project Plan. As part of this process, we maintain a Risk Mitigation Matrix that identifies potential or actual risks to the project by severity (e.g., high, medium, low) and sets forth actions for resolving each risk. As the need for change arises, we follow an established process for communicating and achieving consensus on the change(s) being requested.

We use a proven Status Report format that provides an accurate and timely snapshot of project, task, and deliverable status for use by the project team and work with each client to modify the report, as needed, to best meet the needs of the engagement. We recommend a report design that can be easily rolled up and re-used to meet stakeholder communication and reporting needs.

Project Closing: Close down processes are designed to ensure that expectations have been met and tasks have been completed as agreed upon. The BDMP Project Manager is responsible for the approval and transfer of deliverables to designated client personnel in the format specified. Deliverables are provided in compliance with project specifications and/or as required by the client's record management policies.

Management of Personnel

While we do not anticipate needing to replace personnel who have been assigned to work on a specific project, should staffing issues arise over the course of any engagement with the State,



our Project Manager (or Project Principal, if appropriate) will work with the State to address the issue within 24 hours of notification. Whenever possible, we will work to remediate the issue and come to a satisfactory resolution between the BDMP personnel and the State. Should the need arise to replace any of our project team members, we will notify the State of the situation and provide recommendations for an appropriate resolution.

Within our Management and Information Technology Group we have sufficient resources to provide back-ups for each of the named individuals. In addition, we maintain a systematic and detailed document repository for each client engagement, including meeting minutes, status reports, work plans, and schedules. This would allow a back-up team member to begin work on the project immediately upon identification of the need and help to provide continuity among project team members throughout the engagement.

Use of Automated Project Management Software

We use a range of technology tools during our project management engagements to communicate effectively with clients, vendors, and other stakeholders, including:

- **Project Deliverables Control Log (MS Excel):** This document contains a comprehensive list of all project deliverables, and is used to track planning, review, approval, and file location of deliverables.
- **Risk Management Matrix (MS Excel):** This tool facilitates the documentation, regular review, and mitigation of project risks by the Project Manager. Each risk is evaluated for impact and probability. Those with a high impact and/or a high probability will require further analysis and, when necessary, the development of a risk mitigation plan.
- **Quality Control Log (MS Excel):** This tool facilitates the documentation and monitoring of compliance with applicable policies, standards, and regulations by project management. This repository contains those high-level requirements that may not be captured in the specifications of each project component.
- **Project Schedule (MS Project):** The Project Schedule reflects all project milestones, deliverables, and tasks. For ease of maintenance and “what-if” analysis, dates serve as a function of task duration and dependencies as opposed to set constraints.
- **Status Report (MS Word):** We work with our clients to develop an acceptable standard report format that provides an accurate and timely snapshot of project, task, and deliverable status for use by the project team. Consideration is given to development of a design that can be easily rolled up by team or by project and re-used to meet stakeholder communication and reporting needs.
- **BDMP Change Control Procedures and Forms (MS Word):** The Change Management procedures and controls we use are consistent with accepted professional standards. We adapt Change Forms to meet the specific needs of clients, as appropriate.
- **Microsoft Word and Excel:** Most of our deliverables are initially developed using these common software applications.



- **Adobe Acrobat:** We will provide “final” documents in Adobe PDF format, as this format allows documents to be easily shared with project stakeholders without the concern that documents have been altered. This transferable file format allows clients to access and read the deliverable documents without having to license specific Microsoft software products.
- **Microsoft Project:** We use Microsoft Project to develop and maintain project schedules. Where licensing constraints present a barrier, BDMP can easily provide an alternative format such as PDF for ease of client access. In addition, all of our proposed Project Managers are familiar with Microsoft Project and using it to manage engagements.
- **Microsoft PowerPoint:** We use PowerPoint primarily for communicating key information during presentations and training sessions. In addition to displaying the PowerPoint presentation on a display screen, we provide hand-outs of the presentation for participants.
- **Microsoft Visio:** We use Visio for the development of flowcharts, organization charts, and business process diagrams and typically provide clients with final versions in both Visio and PDF formats.
- **Microsoft SharePoint (Web-based Project Management solution):** BDMP has established BDMP KnowledgeLink, a customized Microsoft SharePoint tool, to secure and share project documentation and facilitate secure online communication and collaboration. This application contains the ability to maintain online project calendars, maintain lists of project team members and contact information, and serve as a repository for documents created throughout the engagement.

3.3 Quality Control

BDMP is an independent Certified Public Accounting and management consulting firm. Our professional services – including our quality control procedures – have always complied with the regulations of the American Institute of Certified Public Accountants (AICPA), Public Company Accounting Oversight Board (PCAOB), the FDIC, and other regulatory bodies.

We take the quality of our work seriously and work to exceed our clients’ expectations of the quality and timeliness of our communications, service delivery, and final work products. We strive to assure quality by understanding client expectations, developing a reasonable and achievable project approach, gaining client concurrence on project tasks and timing, and using appropriate staff for each engagement.

Our approach to quality management is applicable to performance and products. We use applicable policy, law, regulation, standards, and best practices to develop a comprehensive Quality Management Plan for client engagements. This approach to quality management is applicable to performance and products. It is consistent with standards developed by the Project Management Institute and the International Organization for Standardization (ISO) as detailed in ISO 9000 and 10000.



3.4 Service Category: Technology Advisory Services

BDMP offers extensive experience in providing independent technology advisory services in the following areas:

- Strategic technology planning;
- System planning and requirements definition;
- Business process re-engineering;
- RFP development, procurement oversight, and contract negotiation;
- Project management oversight of system implementations;
- Organizational and operational design and improvement; and
- Performance measurement.

Our work has spanned all areas of government operations. In Table 2, we have provided a representative list of clients for whom we have provided relevant consulting services for this category.

Table 2: Representative Technology Advisory Services Clients

Project	Clients
Business Process Analysis and Improvement	<ul style="list-style-type: none"> • Arlington County, Virginia • City of Fairfax, Virginia • Louisiana Division of Administration • Maine Bureau of Accounts and Control • Maine Department of Transportation • Maine Supreme Judicial Court • New Hampshire Department of Justice • New Hampshire Department of Secretary of State
Requirements Definition, System Planning, and RFP Development	<ul style="list-style-type: none"> • City of Newport News, Virginia • City of Toledo, Ohio • Maine Bureau of Accounts and Control • Maine Bureau of Motor Vehicles • Massachusetts Department of Public Health • Tampa Port Authority • Town of Leesburg, Virginia
Strategic Technology Planning	<ul style="list-style-type: none"> • City of Alpharetta, Georgia • City of Concord, New Hampshire • City of Greenville, South Carolina • City of Portage, Michigan • City of Suffolk, Virginia • Scott County, Iowa • State of New Hampshire • Town of Wayland, Massachusetts



Technology Advisory Services References

On the following pages, we have provided references for three projects that describe the services BDMP has provided related to Technology Advisory Services. We encourage the State to contact these references to inquire about the quality of services provided by BDMP.

BDMP Reference #1: West Virginia Department of Health and Human Resources	
Contact Information:	Ms. Darlene Thomas Chief Technology Officer West Virginia DHHR 350 Capitol Street, Room 313 Charleston, West Virginia 25301 (304) 558-9145
Project Dates:	October 2008 to January 2009
Project Value:	\$15,680
Project Details:	<p>BDMP has enjoyed a long-standing relationship with DHHR’s Bureau for Medical Services (BMS). Our work with BMS started in 2003 when BDMP began providing quality assurance services for the State’s Medicaid Management Information System (MMIS) implementation. We have recently undertaken a new project with BMS to provide project management services for the State’s MMIS re-procurement.</p> <p>While pre-qualified under the State’s ITECH07 contract, BDMP provided services to the DHHR under the service category 11 – Project Quality Assurance Review and Associated Services (IT Security). BDMP conducted a review of specific aspects of logical access controls over DHHR’s three significant computer systems: RAPIDS, FACTS, and OSCAR.</p>



BDMP Reference #2: City of Newport News, Virginia	
Contact Information:	Mr. Alan Krumm Project Manager, Enterprise Resource Planning Information Technology Department 2400 Washington Avenue, City Hall Newport News, Virginia 23607 (757) 926-1770
Project Dates:	November 2005 to November 2006
Project Value	\$389,000
Project Details:	<p>BDMP assisted the City of Newport News with two projects that involved evaluating current legacy mainframe-based systems and determining whether the City should maintain the current systems, upgrade the systems, or replace the systems with integrated technology solutions.</p> <p>We evaluated the City’s current financial/HR/payroll systems, as well as the City’s automated assessment and collection systems, worked with City stakeholders to develop technical and functional system specifications, conducted research of the best practices supported by commercial systems, identified best practices of other Virginia municipalities, and developed recommendations based on our findings and understanding of the City’s needs.</p> <p>In our work with the City’s Treasurer’s Office, Assessor’s Office, and Commissioner of the Revenue’s Office, we also developed detailed workflow diagrams of the City’s assessment and collection activities to provide the City with documentation of their “as is” environment as they plan for the potential business process changes that will come with a new system.</p>



BDMP Reference #3: City of Fairfax, Virginia	
Contact Information:	Ms. Gail Bohan Director of Information Technology 10455 Armstrong Street, Room 209 Fairfax, Virginia (703) 385-7896
Project Dates:	May to December 2006
Project Value:	\$134,000
Project Details:	<p>BDMP conducted a workflow analysis and business process redesign project for the City of Fairfax, Virginia, involving three of the City's main business areas: financial management and budgeting, public safety, and community development and planning. We documented the "as is" environment, researched best practices, developed recommendations for business process changes, and provided a detailed implementation plan for the restructuring of existing workflows and business processes in order to make best use of the skills of the staff.</p> <p>One of the areas of our focus was on the City's Purchasing functions. In our review, we identified issues related to lack of automation in the procurement process, which created several inefficiencies and challenges related to tracking and storing requisitions, increased time requirements for processing and approving requisitions, duplication of entries, lack of up-to-date budget information, added time and expense of manual processes such as processing requisitions and purchase orders, and lack of accessible historical purchasing data. In developing recommendations, we considered ways that the City's current software package (Pentamation) could be leveraged to improve process challenges identified.</p>



3.5 Service Category: Major Project Implementation (Including Project Management)

BDMP has served many state and local government agencies in the role of project manager. Our experience includes project teams comprised of large and diverse stakeholder groups. We are accustomed to the types of projects described by the State in its RFQ and the requirements that managing these types of projects entail.

We utilize proven project management and quality assurance processes based on Project Management Institute (PMI) principles and scale them to fit the specific needs of each project. Our approach includes applying standard processes across the project management lifecycle. Our clients have leveraged our professional project management experience by repeatedly selecting members of our project team to perform independent point-in-time assessments, assist project recovery initiatives, and facilitate the adoption and integration of best practices through project management mentoring. In all cases, we apply proven project management processes from the *Project Management Book of Knowledge (PMBOK)*, published by the Project Management Institute, to complement a variety of system development methodologies.

In Table 3, we have provided a representative list of clients for whom we have provided relevant consulting services for this category.

Table 3: Representative Project Management Engagements

Client	Project
Appalachian Trail Conservancy	Project Management Oversight of System Implementation
City of Richmond, Virginia	Project Management Oversight for Revenue and Collection System Implementation
Maryland Judiciary	Independent Verification and Validation (IV&V) for Revenue Collection System Implementation
Maine Bureau for Accounts and Control	Project Management for Statewide Time and Attendance System Planning and Implementation
New Hampshire Department of Administrative Services	Independent Oversight of Statewide ERP System Implementation
New Hampshire Department of Health and Human Services	IV&V for Medicaid Decision Support System Implementation
North Carolina Office of the State Auditor	Independent Assessment of State Enterprise Project Management Office (EPMO)
Maine Department of Health and Human Services	IV&V for Medicaid System Implementation
West Virginia Bureau for Medical Services	Project Management and Quality Assurance for Medicaid System Implementation



BDMP Reference #3: Massachusetts Information Technology Division	
Contact Information:	Mr. Darrel Harmer, Director Program Management Office Massachusetts Information Technology Division One Ashburton Place, Room 1601 Boston, Massachusetts 02108 (617) 626-4621
Project Dates:	IT Capital Project Health Assessments - February to March 2009 IV&V for PeopleSoft HRD Upgrade - September 2009 to February 2010
Project Value:	IT Capital Project Health Assessments - \$127,000 IV&V for PeopleSoft HRD Upgrade - \$251,000
Project Details:	<p>BDMP was engaged by the Massachusetts Information Technology Division (ITD) to perform Independent Project Health Assessments of eight previously approved projects funded by the Commonwealth's Capital IT Program. The goal of this project was to assess whether 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 Commonwealth 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 key "indicators" of project health for each project: Cost, Schedule, Scope, Risks and Issues, Quality, Customer Satisfaction, Project Management, and 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>



SECTION IV – REQUIRED DOCUMENTATION

On the following pages, we have provided copies of the following required documents:

- Purchasing Affidavit;
- Exhibit 10, Addendum Acknowledgement;
- Signed Addenda 1, 2, and 3; and,
- Completed page 5 of RFQ.

Our firm does not qualify as an in-state vendor, as we are headquartered in the State of Maine. We do not qualify for State of West Virginia vendor preference, so we have not provided a copy of the Vendor's Preference Form.



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
 ITECH10

PAGE
 1

ADDRESS CORRESPONDENCE TO ATTENTION OF
 JO ANN ADKINS
 804-558-8802

RFQ COPY
 TYPE NAME/ADDRESS HERE

Berry, Dunn, McNeil & Parker
 100 Middle Street
 Portland, ME 04104

ALL STATE AGENCIES
 AND POLITICAL SUBDIVISIONS
 VARIOUS LOCALES AS INDICATED
 BY ORDER

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
12/21/2009				

BID OPENING DATE: 01/14/2010 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
***** ADDENDUM NO. 1 ***** 1. BID OPENING DATE HAS BEEN MOVED TO 1/14/2010. 2. ITECH10 QUESTIONS AND ANSWERS, 6 PAGES, ATTACHED. ***** END OF ADDENDUM NO. 1 *****						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE <i>Timothy J. Masse</i>	TELEPHONE 207-775-2387	DATE 1/13/10
TITLE Principal	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
 Post Office Box 50130
 Charleston, WV 25305-0130

Request for Quotation

RFQ NUMBER
 ITECH10

PAGE
 1

ADDRESS CORRESPONDENCE TO ATTENTION OF
 JO ANN ADKINS
 304-558-8802

RFQ COPY

TYPE NAME/ADDRESS HERE

SHIP TO

ALL STATE AGENCIES
 AND POLITICAL SUBDIVISIONS
 VARIOUS LOCALES AS INDICATED
 BY ORDER

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
12/29/2009				

BID OPENING DATE: 01/14/2010 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	CAT. NO.	ITEM NUMBER	UNIT PRICE	AMOUNT
<p>***** ADDENDUM NO. 2 *****</p> <p>1. WHAT IS THE FORMAT THAT YOU NEED FOR REFERENCES?</p> <p>ON SUPPLEMENTAL STAFFING, YOU SHOULD DO A PAGE PER REFERENCE WITH THE FORMAT AS FOLLOW: PROJECT DESCRIPTION (A PARAGRAPH DESCRIBING THE PROJECT); DESCRIPTION OF DUTIES (DESCRIPTION OF THE FUNCTIONS PROVIDED); GENERAL VALUE (DOLLAR AMOUNT); LENGTH OF PROJECT (TOTAL HOURS INVOLVED); CUSTOMER NAME AND ADDRESS, CONTACT NAME, TELEPHONE NUMBER AND E-MAIL ADDRESS OF CONTACT.</p> <p>PROJECT-BASED SERVICES, YOU SHOULD DO A PAGE REFERENCE WITH THE FORMAT AS FOLLOWS: PROJECT DESCRIPTION (A PARAGRAPH DESCRIBING THE PROJECT); GENERAL VALUE (DOLLAR AMOUNT); LENGHT OF PROJECT (TOTAL TIME INVOLVED); TYPE OF CONTRACTORS USED (DESCRIBE WHAT TYPES OF CONTRACTORS USED, I.E., MAINFRAME PROGRAMMER, INTERNET DEVELOPER); CLIENT NAME AND ADDRESS, CONTACT NAME, TELEPHONE NUMBER AND E-MAIL ADDRESS OF CONTACT.</p> <p>***** QUESTION AND ANSWER PERIOD HAS BEEN EXTENDED UNTIL JANUARY 6, 2010. NOTE: NO QUESTIONS WILL BE ACCEPTED OR RESPONDED TO AFTER THIS DATE.</p> <p>***** END OF ADDENDUM NO. 2 *****</p>						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE <i>Timothy F. Mann</i>	TELEPHONE 207-775-2387	DATE 01/13/2010
TITLE Principal	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
 Post Office Box 50130
 Charleston, WV 25305-0130

Request for Quotation

RFQ NUMBER: ITECH10

PAGE: 1

ADDRESS CORRESPONDENCE TO ATTENTION OF:
 JO ANN ADKINS
 304-558-8802

RFQ COPY
 TYPE NAME/ADDRESS HERE

VENDOR

SHIP TO

ALL STATE AGENCIES
 AND POLITICAL SUBDIVISIONS
 VARIOUS LOCALES AS INDICATED
 BY ORDER

DATE PRINTED	TERMS OF SALE	SHIP VIA	F.O.B.	FREIGHT TERMS
01/11/2010				

BID OPENING DATE: 01/20/2010 BID OPENING TIME: 01:30PM

LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
***** ADDENDUM NO. 3 ***** 1. BID OPENING DATE HAS BEEN MOVED TO 01/20/2010. 2. ITECH10 QUESTIONS AND ANSWERS ATTACHED. ***** END OF ADDENDUM NO. 3 *****						
0001	1	EA		946-30		
TECHNICAL SUPPORT						

SEE REVERSE SIDE FOR TERMS AND CONDITIONS

SIGNATURE: <i>Timothy F. Morse</i>	TELEPHONE: 207-775-2387	DATE: 01/13/2010
TITLE: Principal	FEIN: 01-0523282	ADDRESS CHANGES TO BE NOTED ABOVE

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

EXHIBIT 10

REQUISITION NO.: ITECH10

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 ^x.....

NO. 2 ^x.....

NO. 3 ^x.....

NO. 4

NO. 5

I UNDERSTAND THAT FAILURE TO CONFIRM THE RECEIPT OF THE ADDENDUM(S) MAY BE CAUSE FOR REJECTION OF BIDS. 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.

Timothy F. Mason
.....
SIGNATURE

Berry, Dunn, McNeil & Parker
.....
COMPANY

January 13, 2010
.....
DATE

STATE OF WEST VIRGINIA
Purchasing Division

PURCHASING AFFIDAVIT

VENDOR OWING A DEBT TO THE STATE:

West Virginia Code §5A-3-10a provides that: 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.

PUBLIC IMPROVEMENT CONTRACTS & DRUG-FREE WORKPLACE ACT:

If this is a solicitation for a public improvement construction contract, the vendor, by its signature below, affirms that it has a written plan for a drug-free workplace policy in compliance with Article 1D, Chapter 21 of the *West Virginia Code*. The vendor **must** make said affirmation with its bid submission. Further, public improvement construction contract may not be awarded to a vendor who does not have a written plan for a drug-free workplace policy in compliance with Article 1D, Chapter 21 of the *West Virginia Code* and who has not submitted that plan to the appropriate contracting authority in timely fashion. For a vendor who is a subcontractor, compliance with Section 5, Article 1D, Chapter 21 of the *West Virginia Code* may take place before their work on the public improvement is begun.

ANTITRUST:

In submitting a bid to any agency for the state of West Virginia, the bidder offers and agrees that if the bid is accepted the bidder will convey, sell, assign or transfer to the state of West Virginia all rights, title and interest in and to all causes of action it may now or hereafter acquire under the antitrust laws of the United States and the state of West Virginia for price fixing and/or unreasonable restraints of trade relating to the particular commodities or services purchased or acquired by the state of West Virginia. Such assignment shall be made and become effective at the time the purchasing agency tenders the initial payment to the bidder.

I certify that this bid is made without prior understanding, agreement, or connection with any corporation, firm, limited liability company, partnership or person or entity submitting a bid for the same materials, supplies, equipment or services and is in all respects fair and without collusion or fraud. I further certify that I am authorized to sign the certification on behalf of the bidder or this bid.

LICENSING:

Vendors must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local agency of West Virginia, including, but not limited to, the West Virginia Secretary of State's Office, the West Virginia Tax Department, West Virginia Insurance Commission, or any other state agencies or political subdivision. Furthermore, the vendor must provide all necessary releases to obtain information to enable the Director or spending unit to verify that the vendor is licensed and in good standing with the above entities.

CONFIDENTIALITY:

The vendor agrees that he or she will not disclose to anyone, directly or indirectly, any such personally identifiable information or other confidential information gained from the agency, unless the individual who is the subject of the information consents to the disclosure in writing or the disclosure is made pursuant to the agency's policies, procedures and rules. Vendor further agrees to comply with the Confidentiality Policies and Information Security Accountability Requirements, set forth in <http://www.state.wv.us/admin/purchase/privacy/noticeConfidentiality.pdf>.

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.

Vendor's Name: Berry, Dunn, McNeil & Parker

Authorized Signature: Timothy J. Mene

Date: 01/13/2010