



West Virginia Purchasing Division

2019 Washington Street, East
Charleston, WV 25305
Telephone: 304-558-2306
General Fax: 304-558-6026
Bid Fax: 304-558-3970

The following documentation is an electronically-submitted vendor response to an advertised solicitation from the *West Virginia Purchasing Bulletin* within the Vendor Self-Service portal at ***wvOASIS.gov***. As part of the State of West Virginia's procurement process, and to maintain the transparency of the bid-opening process, this documentation submitted online is publicly posted by the West Virginia Purchasing Division at ***WVPurchasing.gov*** with any other vendor responses to this solicitation submitted to the Purchasing Division in hard copy format.

Header @ 1

List View

General Information | [Contact](#) | [Default Values](#) | [Discount](#) | [Document Information](#)

Procurement Folder: 315332

Procurement Type: Central Purchase Order

Vendor ID: VS0000009860

Legal Name: Smart Shared Services, LLC

Alias/DBA: Fenwick Technologies

Total Bid: \$229,400.00

Response Date: 05/10/2017

Response Time: 16:33

SO Doc Code: CRFQ

SO Dept: 0323

SO Doc ID: WWW1700000005

Published Date: 5/4/17

Close Date: 5/11/17

Close Time: 13:30

Status: Closed

Solicitation Description: Addendum No.01 - Project Management

Total of Header Attachments: 1

Total of All Attachments: 1



Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

**State of West Virginia
 Solicitation Response**

Proc Folder : 315332
Solicitation Description : Addendum No.01 - Project Management
Proc Type : Central Purchase Order

Date issued	Solicitation Closes	Solicitation Response	Version
	2017-05-11 13:30:00	SR 0323 ESR05101700000005504	1

VENDOR
VS0000009860 Smart Shared Services, LLC Fenwick Technologies

Solicitation Number: CRFQ 0323 WWV1700000005

Total Bid : \$229,400.00 **Response Date:** 2017-05-10 **Response Time:** 16:33:27

Comments:

FOR INFORMATION CONTACT THE BUYER
 Brittany E Ingraham
 (304) 558-2157
 brittany.e.ingraham@wv.gov

Signature on File	FEIN #	DATE
--------------------------	---------------	-------------

All offers subject to all terms and conditions contained in this solicitation

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
1	Project Management				\$229,400.00

Comm Code	Manufacturer	Specification	Model #
80000000			

Extended Description : Please see Exhibit A Pricing Page. Vendor must submit pricing page with their submitted bid response.



Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

State of West Virginia
 Request for Quotation
 34 - Service - Prof

Proc Folder: 315332

Doc Description: Addendum No.01 - Project Management

Proc Type: Central Purchase Order

Date Issued	Solicitation Closes	Solicitation No	Version
2017-05-04	2017-05-11 13:30:00	CRFQ 0323 WWV1700000005	2

BID RECEIVING LOCATION

BID CLERK
 DEPARTMENT OF ADMINISTRATION
 PURCHASING DIVISION
 2019 WASHINGTON ST E
 CHARLESTON WV 25305
 US

VENDOR

Vendor Name, Address and Telephone Number:

Smart Shared Services
 PO Box 7318
 Cross Lanes, WV 25356

FOR INFORMATION CONTACT THE BUYER

Brittany E Ingraham
 (304) 558-2157
 brittany.e.ingraham@wv.gov

Signature X

Eva Borodinsky

FEIN # 47-1148168

DATE 5-4-17

All offers subject to all terms and conditions contained in this solicitation

DESIGNATED CONTACT: Vendor appoints the individual identified in this Section as the Contract Administrator and the initial point of contact for matters relating to this Contract.

Eva Kordusky / VP of Business Operations
(Name, Title)

Eva Kordusky / VP of Business Operations
(Printed Name and Title)

405 Capitol St, Ste 608
(Address)

855-807-6278 / 888-680-6555
(Phone Number) / (Fax Number)

eva.kordusky@ssllc.com
(email address)

CERTIFICATION AND SIGNATURE: By signing below, or submitting documentation through wvOASIS, I certify that I have reviewed this Solicitation in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that this bid, offer or proposal constitutes an offer to the State that cannot be unilaterally withdrawn; that the product or service proposed meets the mandatory requirements contained in the Solicitation for that product or service, unless otherwise stated herein; that the Vendor accepts the terms and conditions contained in the Solicitation, unless otherwise stated herein; that I am submitting this bid, offer or proposal for review and consideration; that I am authorized by the vendor to execute and submit this bid, offer, or proposal, or any documents related thereto on vendor's behalf; that I am authorized to bind the vendor in a contractual relationship; and that to the best of my knowledge, the vendor has properly registered with any State agency that may require registration.

Smart Shared Services, LLC
(Company)

Eva Kordusky Eva Kordusky / VP of Bus. Ops.
(Authorized Signature) (Representative Name, Title)

Eva Kordusky VP of Bus. Ops.
(Printed Name and Title of Authorized Representative)

5-3-17
(Date)

855-807-6278 / 888-680-6555
(Phone Number) (Fax Number)

VENDOR PREFERENCE CERTIFICATE

Certification and application is hereby made for Preference in accordance with **West Virginia Code, §5A-3-37**. (Does not apply to construction contracts). **West Virginia Code, §5A-3-37**, provides an opportunity for qualifying vendors to request (at the time of bid) preference for their residency status. Such preference is an evaluation method only and will be applied only to the cost bid in accordance with the **West Virginia Code**. This certificate for application is to be used to request such preference. The Purchasing Division will make the determination of the Vendor Preference, if applicable.

- 1. **Application is made for 2.5% vendor preference for the reason checked:**
 Bidder is an individual resident vendor and has resided continuously in West Virginia for four (4) years immediately preceding the date of this certification; **or**,
 Bidder is a partnership, association or corporation resident vendor and has maintained its headquarters or principal place of business continuously in West Virginia for four (4) years immediately preceding the date of this certification;
 Bidder is a resident vendor partnership, association, or corporation with at least eighty percent of ownership interest of bidder held by another entity that meets the applicable four year residency requirement; **or**,
 Bidder is a nonresident vendor which has an affiliate or subsidiary which employs a minimum of one hundred state residents and which has maintained its headquarters or principal place of business within West Virginia continuously for the four (4) years immediately preceding the date of this certification; **or**,
- 2. **Application is made for 2.5% vendor preference for the reason checked:**
 Bidder is a resident vendor who certifies that, during the life of the contract, on average at least 75% of the employees working on the project being bid are residents of West Virginia who have resided in the state continuously for the two years immediately preceding submission of this bid; **or**,
- 3. **Application is made for 2.5% vendor preference for the reason checked:**
 Bidder is a nonresident vendor that employs a minimum of one hundred state residents, or a nonresident vendor which has an affiliate or subsidiary which maintains its headquarters or principal place of business within West Virginia and employs a minimum of one hundred state residents, and for purposes of producing or distributing the commodities or completing the project which is the subject of the bidder's bid and continuously over the entire term of the project, on average at least seventy-five percent of the bidder's employees or the bidder's affiliate's or subsidiary's employees are residents of West Virginia who have resided in the state continuously for the two immediately preceding years and the vendor's bid; **or**,
- 4. **Application is made for 5% vendor preference for the reason checked:**
 Bidder meets either the requirement of both subdivisions (1) and (2) or subdivision (1) and (3) as stated above; **or**,
- 5. **Application is made for 3.5% vendor preference who is a veteran for the reason checked:**
 Bidder is an individual resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard and has resided in West Virginia continuously for the four years immediately preceding the date on which the bid is submitted; **or**,
- 6. **Application is made for 3.5% vendor preference who is a veteran for the reason checked:**
 Bidder is a resident vendor who is a veteran of the United States armed forces, the reserves or the National Guard, if, for purposes of producing or distributing the commodities or completing the project which is the subject of the vendor's bid and continuously over the entire term of the project, on average at least seventy-five percent of the vendor's employees are residents of West Virginia who have resided in the state continuously for the two immediately preceding years.
- 7. **Application is made for preference as a non-resident small, women- and minority-owned business, in accordance with West Virginia Code §5A-3-59 and West Virginia Code of State Rules.**
 Bidder has been or expects to be approved prior to contract award by the Purchasing Division as a certified small, women- and minority-owned business.

Bidder understands if the Secretary of Revenue determines that a Bidder receiving preference has failed to continue to meet the requirements for such preference, the Secretary may order the Director of Purchasing to: (a) rescind the contract or purchase order; or (b) assess a penalty against such Bidder in an amount not to exceed 5% of the bid amount and that such penalty will be paid to the contracting agency or deducted from any unpaid balance on the contract or purchase order.

By submission of this certificate, Bidder agrees to disclose any reasonably requested information to the Purchasing Division and authorizes the Department of Revenue to disclose to the Director of Purchasing appropriate information verifying that Bidder has paid the required business taxes, provided that such information does not contain the amounts of taxes paid nor any other information deemed by the Tax Commissioner to be confidential.

Bidder hereby certifies that this certificate is true and accurate in all respects; and that if a contract is issued to Bidder and if anything contained within this certificate changes during the term of the contract, Bidder will notify the Purchasing Division in writing immediately.

Bidder: Smart Shared Services, LLC Signed: Eva Kravinsky
 Date: 5-3-17 Title: VP of Business Operations

*Check any combination of preference consideration(s) indicated above, which you are entitled to receive.

STATE OF WEST VIRGINIA
Purchasing Division

PURCHASING AFFIDAVIT

MANDATE: Under W. Va. Code §5A-3-10a, 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: (1) the debt owed is an amount greater than one thousand dollars in the aggregate; or (2) the debtor is in employer default.

EXCEPTION: The prohibition listed above does not apply where a vendor has contested any tax administered pursuant to chapter eleven of the W. Va. 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.

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.

"Employer default" means having an outstanding balance or liability to the old fund or to the uninsured employers' fund or being in policy default, as defined in W. Va. Code § 23-2c-2, failure to maintain mandatory workers' compensation coverage, or failure to fully meet its obligations as a workers' compensation self-insured employer. An employer is not in employer default if it has entered into a repayment agreement with the Insurance Commissioner and remains in compliance with the obligations under the repayment agreement.

"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 exceed five percent of the total contract amount.

AFFIRMATION: By signing this form, the vendor's authorized signer affirms and acknowledges under penalty of law for false swearing (W. Va. Code §61-5-3) that neither vendor nor any related party owe a debt as defined above and that neither vendor nor any related party are in employer default as defined above, unless the debt or employer default is permitted under the exception above.

WITNESS THE FOLLOWING SIGNATURE:

Vendor's Name: Smart Shared Services LLC

Authorized Signature: Eva Koranushy Date: 5-3-17

State of WEST VIRGINIA

County of KANAWHA, to-wit:

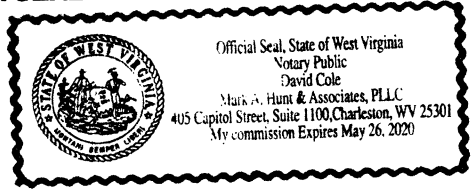
Taken, subscribed, and sworn to before me this 3 day of MAY, 2017.

My Commission expires MAY 26, 2020, 20 .

AFFIX SEAL HERE

NOTARY PUBLIC [Signature]

Purchasing Affidavit (Revised 08/01/2015)



ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: WV170000005

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:
(Check the box next to each addendum received)

- | | |
|----------------------------------------------------|------------------------------------------|
| <input checked="" type="checkbox"/> Addendum No. 1 | <input type="checkbox"/> Addendum No. 6 |
| <input type="checkbox"/> Addendum No. 2 | <input type="checkbox"/> Addendum No. 7 |
| <input type="checkbox"/> Addendum No. 3 | <input type="checkbox"/> Addendum No. 8 |
| <input type="checkbox"/> Addendum No. 4 | <input type="checkbox"/> Addendum No. 9 |
| <input type="checkbox"/> Addendum No. 5 | <input type="checkbox"/> Addendum No. 10 |

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further 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.

Smart Shared Services, LLC
Company

Eva Kordusky
Authorized Signature

5-4-17
Date

NOTE: This addendum acknowledgment should be submitted with the bid to expedite document processing.
Revised 6/8/2012

**EXHIBIT A- Pricing Page for Project Management - Smart Shared Services
- Aimee Browning**

Item	Spec.	Description	Unit of Measure	Unit Cost	*Required Hours per Year	Extended Cost
1	4.1	Project Manager Year 1	Per Hour	\$62.00	1850	\$114,700.00
2	4.1	Project Manager Year 2	Per Hour	\$62.00	1850	\$114,700.00
Total Bid Amount						\$229,400.00

*Required hours: The Project Manager shall not work more than a maximum of 1,850 hours per year. Actual hours worked will vary per

AIMEE BROWNING
 IT Applications Project Manager

SUMMARY OF QUALIFICATIONS

- 5+ years of project management experience with employer benefits related services and vendors. Demonstrated track record of successfully managing small to large projects from start to finish.
- Experience managing multiple projects that consolidated many platforms into a single upgraded and consolidated platform
- Articulate and persuasive communicator; at ease communicating with clients, team members and management.
- A highly motivated and energetic professional, dedicated to understanding and meeting client needs. Knowledgeable in project management tools, processes and techniques.
- Exceptional focus, follow-through, and coordination skills. Proven ability to develop and manage project schedules and known for working well with cross-functional teams to achieve on-time project completion.
- Ethical and loyal, maintains a high degree of confidentiality.
- Creative and industrious; thinks “outside of the box” to ensure current and future client needs are met.

Skills Matrix

Responsibility	Y/N	Description of experience
Facilitate the expansion of current integrated enterprise software systems	Y	Managed multiple projects that converted 4-5 existing integrated platforms into an upgraded consolidated platform.
Provide leadership, guidance of the project over 2 teams,	Y	Currently lead and manage 4 projects that utilize teams made up of members from multiple business units such as IT, Operations, Sales, and Account Management.
Assist in planning and strategy activities related to the project.	Y	Currently lead planning and strategy activities as part of the project life cycle on all enterprise projects. Managed multiphase projects where the planning and strategy activities were repeated in every phase of the project.
Serve as risk manager and recommend mitigation strategies to reduce project risks.	Y	Currently lead and manage risk management activities and develop risk mitigation strategies on all enterprise projects.
Support preparation of project status reports, conduct monthly project reviews detailing achievements, progress; changes, forecasts.	Y	Currently provide weekly dashboard status reporting on all projects via a PMO Sharepoint site that details weekly progress and milestones achieved as well as project risks and issues. Follow stringent change management processes for any necessary project changes.
Develop metrics and measurements to demonstrate project progress, evaluating and revising project procedures as necessary.	Y	Currently utilize weekly dashboard reporting that reflects the percentage complete on all projects as well as the health status of the project using a stoplight methodology. Project Scorecards are also utilized on every project.
Bachelor's degree and at least 3 years IT Project Management experience.	Y	Obtained a Bachelor's of Science Degree and have 5+ years of experience managing IT Projects.
Do you have CAPM or PMP certifications.	N	Currently studying to sit for the PMP Exam

PROFESSIONAL EXPERIENCE:

HealthSmart Holdings Inc.

Enterprise PMO Project Manager 2

Aug. 2015 – Current

- Managed multiple projects that involved converting 4-5 existing data platforms into a single consolidated platform
- Managed an Enterprise Data Warehouse project that integrated 10 Medical Claims platforms, Stop Loss and PBM data and is now used as a consolidated platform for standardized customer reporting and provides daily outgoing files to multiple vendors
- Consult with project sponsors and key stakeholders to identify project requirements, define project scope, develop project plan and schedule, provide leadership and coordination with internal teams and vendors.
- Facilitate weekly project meetings with teams in multiple locations.
- Track issues and facilitate resolution.
- Prepare and present timely status reporting to key stakeholders and executive management.
- Develop and distribute both internal communications as well as employer/employee communications.
- Coordinate training, data conversion and user testing.
- Conduct resource planning and budgeting, tracking costs to ensure adherence to budgetary limitations.
- Prepare project presentations for PMO Governance Committee approval.
- Prepare and present project change requests when necessary.
- Conduct and document post implementation “Lessons Learned” meetings.
- Create and update SharePoint sites for each enterprise project.

WV Offices of Insurance Commission

Workers Compensation District Claims Manager

Dec. 20014– July 2015

- Supervise the work of claims and insurance specialists in the WV OIC, Claims Services Department.
- Plan, organize, assign and review staff’s work to insure all program operations are efficiently and effectively administered.
- Insure quality and compliance with WV Code and rules.
- Coordinate and conduct TPA audits for compliance and cost containment.
- Approve/Deny high dollar payments and reserves over \$25,000 and TPA administration invoices.
- Insure quality customer service and expedite resolution of issues and complaints.
- Insure benefit recipients receive checks and directs deposit payments timely and accurately.
- Monitor monthly reporting and identify trends that may lead to an opportunity for improvement.
- Serve as a member of the Settlement Committee
- Represent unit in various interagency meetings, projects and committees, as well as monthly meetings the TPAs.
- Coach, mentor and motivate staff, identify training needs.

Boone County Commission

Deputy County Clerk

Accounts Payable

Aug. 20012– Nov. 2014

- Processed and recorded property deeds, deeds of trust, liens, releases, marriages, deaths, POA and other documents recorded in the County Clerk’s office.
- Processed all accounts payable and issued checks each month for the Boone County Commission and dispersed all incoming levy monies to the corresponding entities.
- Balanced all incoming monthly receipts for the County Commission.
- Administration of all probate processes including transfer of property.
- Served as payroll and insurance clerk back-up.
- Programmed voting machines and worked as an election rover during elections to deal with electronic voting machine issues and processed election results.

Wells Fargo Insurance Services
Project Manager 2

Jan. 2008 – April 2012

- Instrumental in building a disease management program from its infancy.
- Worked with Information Technology professionals to design a proprietary web-portal used an integral part of the disease management program and on-site care manager program.
- Routinely completed an in-depth analysis of Medical and Drug plan designs to create unique and personalized proposals that project future costs, savings and return on investment.
- Maintained strong customer relationships with numerous vendors that are involved in exchanging data with the program.
- Cultivated positive and enduring relationships with clients.
- Trained Care Managers on web-portal usage, conducting disease management consultations, and achieving expectations predetermined by the client.
- Created and managed a Request For Proposal (RFP) Unit for Self Funded TPA business.

Wells Fargo Insurance Services
Account Executive

Oct. 2002 – Dec. 2007

- Used extensive experience to sell, implement, manage and retain a growing book of business.
- Demonstrated success pinpointing clients' needs and uncovering potential problem areas through assessment and analysis.
- Consistently achieved cross-sales goals by identifying and meeting customers' ever- changing benefit needs in the most cost effective manner.
- Annually marketed all lines of employee benefits to seek the most cost effective benefit options.
- Extensive experience with Pharmacy Benefit Managers, that included the creation of custom formularies, annual cost saving analysis of all the therapeutic classes to consider step-therapy measures and formulary changes.
- Instrumental in helping clients develop yearly benefits budget.

Wells Fargo Third Party Administrator
Account Representative

Dec. 1993 – Sep. 2002

- Coordinated all new client installation activities and any benefit changes that were implemented thereafter.
- Served as day to day contact with the client to help assess and meet any needs.
- Performed troubleshooting for any client issues that arose and helped ensure that the issue was resolved immediately.
- Cultivated positive and enduring relationships on a daily basis to ensure client retention.

Education:

Fairmont State College, Fairmont WV
Bachelor of Science: Industrial Psychology

Training:

Project Management Training
Life and Health Agents License
Crystal Reports Training

May 1, 2017

Chris Thomas
PMO Director
HealthSmart Holdings
304.353.7825

Reference for Aimee Browning

Were you/Are you Aimee's supervisor?

Yes. As Director of the Enterprise PMO, I was Aimee's direct Manager at HealthSmart

How would you describe the position Aimee held at while under your direction?

Aimee was a Project Manager II while working for me at HealthSmart. Aimee was responsible for leading project teams and managing all activities in a project life-cycle (initiation planning, executing/controlling, and closing) associated with projects that were across multiple departments within a line of business segment and medium risk, scope and complexity

How would you describe your overall satisfaction with her work on a scale of 1-10?

8

Attitude?

Aimee has a very good attitude toward work and the project team members

Work Ethic?

Aimee has a great work ethic. She is focused on getting the project to completion. There have been occasions where Aimee has sacrificed scheduled PTO to ensure that a project met established timelines.

Personal Interaction with co-workers, superiors, clients?

She could build relationships with team members that reaped benefits for the overall success of the project.

How would you describe the strengths she brings to the Project Manager position she held under your direction?

Aimee brings a relentless desire to succeed. By doing so, she will incorporate all potential options to ensure success. She demonstrates strong organizational skills and ability to meet deadlines amid shifting priorities.

Weaknesses or areas of improvement?

Although I admire Aimee's work ethic and dedication, there are times that it would benefit her to find a healthier work/life balance.

Anything else about Aimee's work you can share that a new employer should know?

Aimee would be an asset to any Project Management organization

Would you hire Aimee again?

Yes