

Technical Proposal

03/07/17 10:00:51  
WV Purchasing Division

## State of West Virginia

Department of Health and Human Resources  
Bureau for Public Health  
Health Statistics Center

### Web Based Software for Vital Records Information Systems Management

Solicitation # CRFP 0506 EHP1700000001  
Opening Date/Time: 3/7/17 1:30 PM EST

Prepared For:

State of West Virginia  
Health and Human Resources  
BPH – Vital Records  
350 Capitol Street, Room 165  
Charleston, WV 25301-3701

Prepared By:

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Diane Borhani

March 7, 2017

March 7, 2017

Department of Administration  
Purchasing Division  
2019 Washington St. E.  
Charleston WV 25305

To Whom It May Concern:

QuantumMark, LLC is pleased to present this response to the Request for Proposal for Web Based Software for Vital Records Information Systems Management. This proposal represents our understanding of your needs and our response is drafted in accordance with the specifications laid out in the RFP.

QuantumMark, LLC is a nationally certified Women-Owned Small Business by the National Women Business Owners Corporation (NWBOC) and we are pending review and final approval of certification through The Women's Business Enterprise National Council (WBENC). As such we are submitting the Vendor Preference Certificate for consideration (Appendix C).

We have recently been recognized for our innovative work in Vital Records by being awarded the Pioneer Award, "Entrepreneur of the Year" by the Northern Nevada Development Authority. This prestigious award is by nomination only and is critically evaluated. It is a testament to QuantumMark's experience and expertise in this field.

QuantumMark, LLC has been providing technology consulting services in the vital records area for nearly two decades. During that time, we have assisted twelve other states with services including, but not limited to, Project Management, Business and System Requirements Definition, RFP Development, Vendor Selection and Contracting, Project Implementation and Vendor Oversight. Our vital records templates and our 30 years of consulting experience have proven to contribute greatly to our clients' implementation success.

QuantumMark agrees to the general terms and conditions set forth in the RFP and agrees to provide the services outlined therein. While we appreciate and agree with the approach in Attachment C: Cost Sheet, there are several major deliverables that are not included in the schedule. We would appreciate the opportunity, if awarded this project, to discuss with the state including those deliverables in the deliverable payment schedule outlined in Attachment C.

We look forward to the opportunity to develop a partnership with West Virginia Vital Records by providing the same quality services that have benefitted other states.

Sincerely,



Diane Borhani, CMC, MBA  
QuantumMark, LLC  
Managing Partner

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**REQUEST FOR PROPOSAL**  
WV Department of Health and Human Resources  
Bureau for Public Health  
EHP1700000001

**Attachment A: Vendor Response Sheet**

*Provide a response regarding the following: firm and staff qualifications and experience in completing similar projects; references; copies of any staff certifications or degrees applicable to this project; proposed staffing plan; descriptions of past projects completed entailing the location of the project, project manager name and contact information, type of project, and what the project goals and objectives were and how they were met.*

**Qualifications and Experience:**

- 3.1. The Vendor should demonstrate prior and/or current involvement and management skill in planning, project development, and technical specification writing services, involving business and system requirements or functional requirements that were or are specifically tailored to three separate state or territory vital statistics offices in the United States by providing:
  - 3.1.1. A staffing plan listing Vendor personnel by name, position in organization, proposed role on project (including expected percentage of project work to be assigned), experience in proposed role, qualifications for proposed role, and role in previous projects as outlined in 3.1.2 through 3.1.5. This plan should include and identify subcontractors
  - 3.1.2. Documentation of three separate previous vital statistics work projects awarded and in-progress or completed by the Vendor within the last 10 years for three different vital registration jurisdictions in which the Vendor utilized the National Association for Public Health Statistics and Information System's (NAPHSIS) Use Case Models for electronic vital statistics systems.
  - 3.1.3. 50% or more of the assigned Vendor staff for this project should document experience in one or more of the skills listed in 3.1.
  - 3.1.4. Documentation that the work projects specified in 3.1.1. involved planning and/or project development and/or technical writing services which led to subsequent development or implementation of electronic web-based vital statistics systems which should have included systems relating to birth or death registration.
    - 3.1.4.1. Documentation of assistance in the actual implementation phase of a full or partial electronic vital statistics system may be substituted for one of the three work projects described in 3.1.1. This documentation could include reference letters from implementation vendors or vital record jurisdictions, an MOU, or other written agreement between vendors\vital record jurisdictions.
  - 3.1.5. Documentation for at least one staff member identified in 3.1.1 as Certified Management Consultant by the Institute of Management Consultants or as a Project Management Professional by the Project Management Institute. This documentation should be included with the Vendor bid, but must be provided prior to contract award.

**Vendor Response:**

## Attachment A – QuantumMark’s Response

### 3.1 Qualifications and Experience

QuantumMark, LLC, a nationally certified women-owned small business, is uniquely qualified to provide the required services to assist the State of West Virginia in planning for, procuring and implementing a web-based software for vital records information systems management. Our nearly two decades of experience and expertise in planning for and managing Vital Records projects is unequivocally the deepest in the industry. Our experience has allowed us to develop requirements and RFP templates that accelerate the pace of the project without putting undo strain on your staff.

We are, to our knowledge, the only experienced consulting firm in the US in the vital records planning arena. We are a corporate member of NAPHSIS. Our membership in NAPHSIS allows us to stay current on trends and topics of interest to the vital records community. We are experienced with the NAPHSIS use case models and how to incorporate what is important from them into your State’s system requirements.

Our expertise in the vital records arena covers the full array of services including Project Management, Business and System Requirements Definition, RFP Development, Vendor Selection and Contracting, Project Implementation and Vendor Oversight. Our work with Alaska, Arkansas, District of Columbia, Georgia, Indiana, Mississippi, Nevada, North Carolina, Oregon, Pennsylvania, South Carolina and Tennessee delivering these services to vital records offices uniquely qualifies QuantumMark to assist the State of West Virginia with this important project.

- **Nearly two decades of vital records reengineering experience**
- **Vital Records specific templates for every deliverable.**
- **Existing business and system matrices already compliant with NAPHSIS standards**
- **The only corporate members of NAPHSIS to provide independent consulting services**
- **Nationally certified consultants**
- **Over 30 years of experience with Project Management Institute (PMI) methodology**
- **Consistent on time, on budget results**
- **Experience working with external stakeholder groups.**
- **Expert at integrating organizational and technology change.**
- **Proven track record of exceptional client satisfaction.**

QuantumMark has spent nearly two decades becoming an expert in vital records. This is a key factor to providing exceptional products and services. Our knowledge of vital records allows us to quickly identify commonalities as well as differences among state practices so that our templates can be quickly and easily modified to meet a specific state's needs. We have over 30 years of experience providing

**The sole focus of QuantumMark is to ensure success through execution. Whether our clients are working on small initiatives or making dramatic changes to meet challenges or opportunities in the marketplace, our experience and skills prove to be the difference between disappointment and success.**

consulting services to both the public and private sector allowing us to bring a breadth and depth of experiences to every project.

To stay relevant we attend the NAPHSIS Annual Conference and have participated at a

national level on the CDC committee to map vital records data to the national model for an electronic health record. Our experience with multiple states allows us to identify and share best practices.

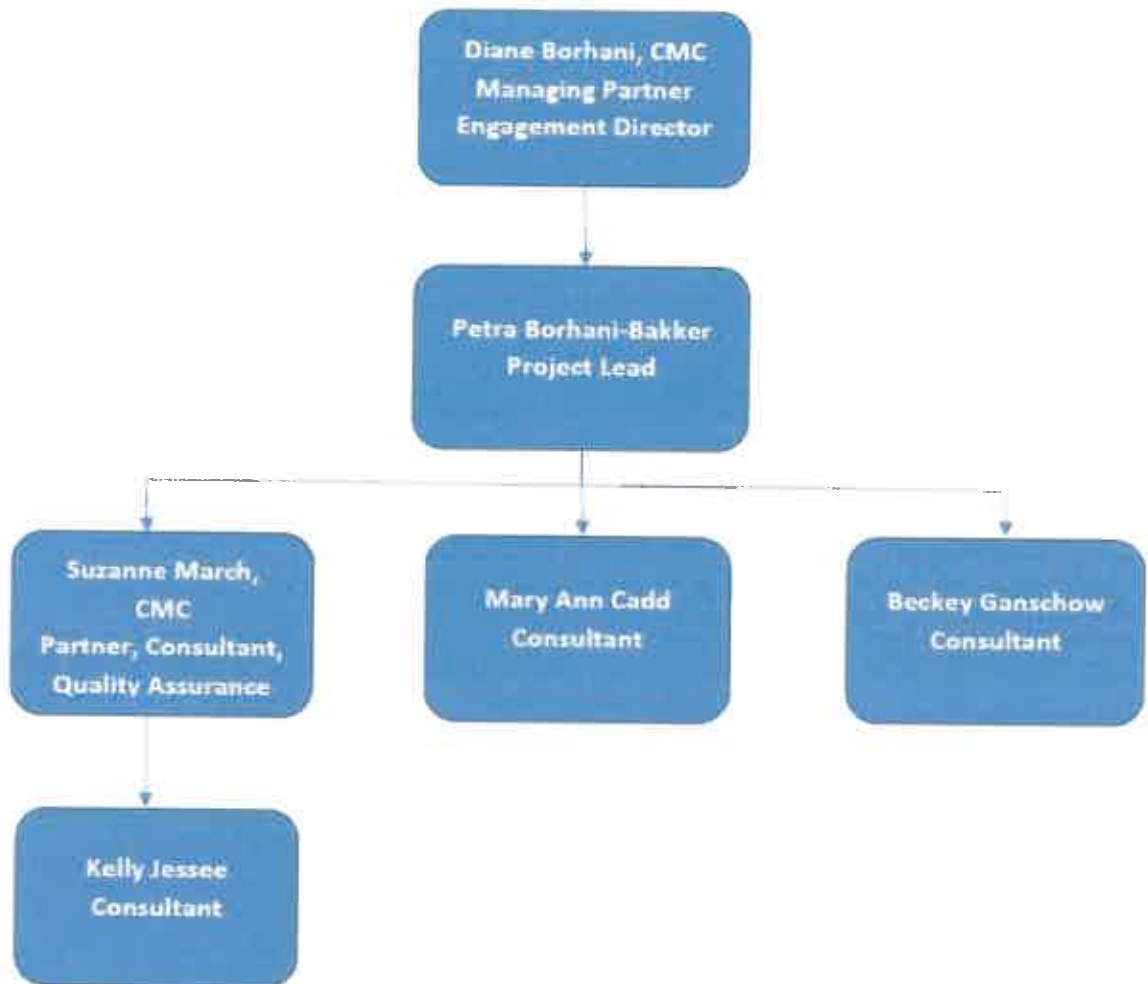
QuantumMark prescribes to the Project Management Institute (PMI) methodology for managing engagements. We pride ourselves on delivering our projects *on time, within budget, according to specifications, and at a level of quality that exceeds our clients' expectations.*

Our certification by the Institute of Management Consultants (IMC) provides confidence that our engagements meet the highest standards of ethics and professionalism. The IMC USA is the premier professional association and sole certifying body for management consultants in the US. IMC USA awards the CMC<sup>®</sup> (Certified Management Consultant) as evidence of meeting high global standards of consulting competence and ethics. *Less than 1% of all consultants have been awarded this certification.* QuantumMark's company partners are certified CMCs<sup>®</sup>. All employees working for QuantumMark, as well as all contractors, are required to sign and abide by the IMC USA Code of Ethics. ([www.imcusa.org](http://www.imcusa.org))



### 3.1.1 Staffing Plan

#### Project Organization Chart



## Roles and Responsibilities

Resource	Title	Percentage of Work	Description of Responsibilities
<b>Diane Borhani</b>	QuantumMark Managing Partner and Engagement Director	25%	<ul style="list-style-type: none"> <li>• Provide project planning, execution, control, and oversight</li> <li>• Provide vital records expertise gained from projects in 12 states</li> <li>• Oversee all project activities</li> <li>• Oversee development of each EVRS deliverables</li> <li>• Conduct internal review of deliverables</li> </ul>
<b>Suzanne March</b>	QuantumMark Partner, Consultant and Quality Assurance Officer	5%	<ul style="list-style-type: none"> <li>• Assist with JAD Sessions</li> <li>• Conduct Cost/Benefit Analysis</li> <li>• Review project deliverables</li> <li>• Provide subject matter expertise</li> <li>• Conduct internal quality assurance</li> </ul>
<b>Petra Borhani-Bakker</b>	QuantumMark Project Lead	30%	<ul style="list-style-type: none"> <li>• Conduct the project kickoff and initiation tasks</li> <li>• Draft the Project Plan</li> <li>• Manage the project schedule</li> <li>• Identify barriers to success and assist team to remove barriers to both internal and external performance</li> <li>• Participate in all project activities</li> <li>• Assist with drafting deliverables</li> <li>• Prepare Monthly Status Reports</li> <li>• Conduct status meetings</li> </ul>
<b>Mary Ann Cadd</b>	QuantumMark Consultant	20%	<ul style="list-style-type: none"> <li>• Assist with Assessment of Current Environment</li> <li>• Prepare Current Environment Deliverable</li> <li>• Participate in JAD Sessions</li> <li>• Assist with preparation of Cost/Benefit Analysis</li> <li>• Other Project activities as assigned</li> </ul>
<b>Kelly Jessee</b>	QuantumMark Consultant	15%	<ul style="list-style-type: none"> <li>• Assist with technical JAD Sessions</li> <li>• Assist with Stakeholder Tour</li> <li>• Other Project activities as assigned</li> </ul>
<b>Beckey Ganschow</b>	QuantumMark Consultant	5%	<ul style="list-style-type: none"> <li>• Prepare Visioning Visios</li> <li>• Other Project activities as assigned</li> </ul>

### 3.1.2 Vital Statistics Work Projects

QuantumMark, LLC utilizes the National Association for Public Health Statistics and Information System's (NAPHSIS) Use Case Models for electronic vital statistics systems in all our Vital Records projects. We have provided summaries of all our vital records. All of our clients are willing to serve as references. We have provided contact information for three (3), as requested in the RFP.

#### *State of Indiana, State Department of Health*

**Project Title: Planning Assistance/RFP Development for an Electronic Vital Event Registry System and Implementation**

**QuantumMark Engagement Director** Diane Borhani

**State Project Contact** Brian Carnes

[bcarnes@isdh.in.gov](mailto:bcarnes@isdh.in.gov)

(317) 233-7523

**Project Dates** 3/2016 to present

Through a competitive RFP process in 2016, the State of Indiana, awarded QuantumMark, LLC a contract to provide consulting services to draft an RFP and manage implementation of a new web-based vital records system. The scope of the project includes:

- ▶ Project planning and Requirements Development
- ▶ Creating a Comprehensive Project Plan including Risk Management Plan, Communication Plan, Quality Assurance Plan and Cost/Benefit Analysis (Budget) Plan
- ▶ Conducting an assessment of the current environment
- ▶ Developing requirements for EVRS Replacement including birth, fetal death, death, marriage and divorce events, etc.
- ▶ Creating a report detailing minimum EVRS requirements
- ▶ Creating a Project Budget
- ▶ Developing an Implementation Plan that recognizes the challenge of moving all electronic users to a new electronic system
- ▶ Creating an RFP Document for procurement of the new web-based EVRS

- ▶ Providing technical assistant and project oversight for implementation of the new EVRS

To date the project is progressing as anticipated, and all deliverables submitted to the state have gone through a formal review and have been approved by the state.

*State of South Carolina, Department of Health and Environmental Control*

**Project Title** Vital Records Consultant

**QuantumMark Engagement Director** Diane Borhani

**State Project Contact** Shae Sutton

[suttonsr@dhec.sc.gov](mailto:suttonsr@dhec.sc.gov)

(803) 898-1808

**Project Dates** 11/2014 to present

In 2014 the State of South Carolina, through a competitive RFP process, awarded QuantumMark, LLC with a contract to assist with preparing for and procuring software for a new web-based vital records system to replace their current electronic system. The scope of the project includes:

- ▶ Creating a Comprehensive Project Plan;
- ▶ Inventorying Current “As Is” Baseline Functions
- ▶ Developing requirements for EVRS Replacement including birth, fetal death, death, marriage and divorce events, etc.
- ▶ Creating a report detailing minimum EVRS requirements
- ▶ Developing an Implementation Plan that recognizes the challenge of moving all electronic users to a new electronic system
- ▶ Creating an RFP Document for procurement of the EVRS
- ▶ Providing technical assistant to PHSIS

To date the project is moving along as anticipated, and all deliverables submitted to the state have gone through a formal review and have been approved by the state. Additionally, The State has elected to execute a contract amendment to retain QuantumMark to provide project management and oversight for the implementation phase of the project.

*State of Alaska, Department of Health and Social Services*

**Project Title** EVRS Planning Project  
**QuantumMark Engagement Director** Diane Borhani  
**State Project Contact** Phillip Mitchell, Retired,  
State Registrar  
Heidi Lengdorfer, Current  
State Registrar

[heidi.lengdorfer@alaska.gov](mailto:heidi.lengdorfer@alaska.gov)

(907) 465-8643

**Project Dates** 11/ 2009 to 6/2015

In 2009 the State of Alaska, through a competitive RFP process, awarded QuantumMark, LLC with a contract to assist them with preparing for and procuring software for a web-based vital records system. The scope of the project included:

- ▶ Creating a Comprehensive Project Plan;
- ▶ Assessment of current “as is” baseline functions;
- ▶ Developing requirements for EVRS including birth, fetal death, death, marriage and divorce events;
- ▶ Drafting a report detailing minimum EVRS requirements;
- ▶ Conducting a cost-benefit analysis of potential replacement EVRS and submitting report;
- ▶ Developing an Implementation Project Plan;
- ▶ Developing an RFP for procurement of the EVRS;
- ▶ Assisting the State with the procurement of an EVRS vendor;
- ▶ Assisting with contract negotiations with the selected vendor; and,
- ▶ Providing technical assistance to the State BVS office during the implementation phase.

QuantumMark oversaw the implementation of the EBRS, EDRS, Fetal Death, Point of Sale Accounting and Inventory, ITOP, Medical Marijuana, Marriage and Divorce. This multi-year, multi-phase project came in ahead of schedule and under budget.

*State of Arkansas, Arkansas Department of Health*

**Project Title** Mortality Records Consultant Services

**Project Dates** 1/2017 to 8/2018 (in progress)

QuantumMark was engaged by the State of Arkansas to provide consulting services for improving the quality of cause of death information on mortality records.

- ▶ Conduct project initiation activities
- ▶ Develop comprehensive project plan
- ▶ Resolve internal barriers and improve internal systems for querying and tracking metrics
- ▶ Improve cause of death coding in goal areas through medical certifier training
- ▶ Improve timeliness and quality of drug-related deaths by improving the work flow process across stakeholder groups
- ▶ Develop Medical Examiner/Coroner timeliness and quality improvement plan
- ▶ Conduct interviews and document processes for coroners, ME and toxicologists for documentation of drug-related deaths
- ▶ Analyze findings for improvement opportunities
- ▶ Establish work groups and facilitate implementation in pilot test mode
- ▶ Develop tracking tools for evaluation and implementation
- ▶ Implement improvement initiatives
- ▶ Prepare final report

*District of Columbia, DC Department of Health, Center for Policy, Planning & Evaluation*

**Project Title** Cause of Death Data Quality

**Project Dates** 12/2016 to 7/2018 (in progress)

QuantumMark was engaged by the District of Columbia to assist with quality improvement for cause of death information on mortality records, specifically related to “Pending” or “Unknown” COD’s.

- ▶ Conduct project initiation activities
- ▶ Develop project plan
- ▶ Work with DC epidemiologist to establish quality and timeliness baseline metrics
- ▶ Assist the District in upgrade EDRS capabilities

- New process design
- New EDRS requirements
- Provide upgrade support
- ▶ Develop training materials
- ▶ Provide training to improve cause of death coding
- ▶ Implement measures to improve current query processes
- ▶ Prepare final report

*State of Mississippi, State Department of Health, Vital Records & Statistics*

**Project Title** EDRS Assessment, Transition and Training

**Project Dates** 8/2015 to 6/2016

QuantumMark was engaged in 2015 by the State of Mississippi to assess the State's death registration process and to train staff in preparation for a new EDRS.

Activities included:

- ▶ Examination of MSDH VR Policies and Procedures
- ▶ Review current death certificate and other standard forms
- ▶ Review of MSDH VR statutes and regulations
- ▶ Observe the workflow of specific activities associated with processing and registering a death record
- ▶ Meet with individual staff regarding roles and responsibilities
- ▶ Evaluate current activities to determine non-value add items
- ▶ Determine activities that could be streamlined
- ▶ Document new activities that will need to be implemented for the new EDRS
- ▶ Create findings and recommendations report
- ▶ Conduct Staff training
- ▶ Final report documenting improvement in work structure and approach for transition to the new EDRS

*State of Arkansas, Department of Health*

**Project Title** ERAVE Death Training

**Project Dates** 12/2014 to 08/2016

The State of Arkansas, selected QuantumMark, LLC to train all stakeholders on their ERAVE system as part of their contract with CDC to report 80% of death records within ten days. Under the contract QuantumMark:

- ▶ Created a training calendar;
- ▶ Created a training class targeted to each stakeholder group;
- ▶ Scheduled training sessions with each stakeholder;
- ▶ Conducted training sessions
  - Group Training sessions;
  - One-on-one Training sessions;
  - Train the Trainer session, where we train one person (or a group of people) who would expected to relay the information to the rest of the facility.
- ▶ For those stakeholders responsible for certifying the medical information added a cause of death” training module. This training ensures that the certifiers know how to distinguish immediate and underlying causes of death, and the standards that CDC, NCHS, NAPHSIS, and the State of Arkansas expect from them.
- ▶ Reported who was trained to the State;
- ▶ Followed up with stakeholders to ensure they are using the system, and
- ▶ Created a monthly deliverable reporting the statistics of those trained, and plans for the upcoming training period.

### *State of Arkansas, Department of Health*

**Project Title** Plan for Re-engineering Vital Records Project

**Project Dates** 11/20/06 to 6/30/14

The State of Arkansas, through a competitive RFP process, awarded QuantumMark, LLC with a contract to supply project management and subject matter knowledge in process reengineering and planning for and procurement of an electronic vital records system. Under this fixed price, fixed deliverable project QuantumMark:

- ▶ Facilitated project kickoff;
- ▶ Provided the initial project plan and monthly status reports for the Social Security Administration (SSA) contract.
- ▶ Provided ongoing project management and reporting;



- ▶ Assessed the current vital records and Identified process efficiency improvement opportunities;
- ▶ Assessed the current technical environment and development of a hardware / software recommendation;
- ▶ Assessed existing technical skills in relation to future technical skill required for various alternative software solutions;
- ▶ Facilitated discussions/decisions on desired future environment (visioning);
- ▶ Developed functional and systems requirements definition including incorporation of the NAPHSIS use case models and Standards and Guidelines as appropriate;
- ▶ Facilitated process to identify and document data migration needs;
- ▶ Developed a Cost Estimate deliverable to support the phased rollout;
- ▶ Developed a phased Implementation Plan and Statewide Rollout Plan;
- ▶ Facilitated logistics and agenda for vendor demonstrations to preview existing COTS functionality;
- ▶ Developed a RFP for procurement of the electronic vital records system;
- ▶ Facilitated the development of the evaluation criteria for the procurement; and,
- ▶ Provided advice during RFP response review and contract negotiations;

All deliverables for the project went through a formal deliverable review process and were approved by the State. Through contract extension, QuantumMark provided project mentoring in the first few months of the implementation phase to ensure that the state/vendor team established sound project management processes. This included:

- ▶ Mentoring the State Project Manager;
- ▶ Conducting quality assurance of vendor project deliverables;
- ▶ Providing a written project audit report quarterly and debrief State project manager and Executive Sponsor on results and suggestions for improvement; and,
- ▶ Assisting in issue resolution and risk management.

*State of North Carolina, Department of Health and Environmental Control*

<b>Project Title</b>	EDRS Templates & Implementation Planning
<b>Project Dates</b>	8/2012 to 2/2013

In 2012 the State of North Carolina awarded QuantumMark, LLC with a contract to assist with implementation planning and the purchase of templates for EDRS and Fetal Death.

The scope of the project included:

- ▶ Providing the state with EDRS templates
- ▶ Providing training to state staff on use of template
- ▶ Providing guidelines for developing a detailed implementation and state-wide rollout strategy.
- ▶ Providing on-site instructional services on the use of the template, how to gather the necessary data to create a comprehensive plan, options for rollout, and facilitation of some major milestone topics to kick start the development of the plan.

*State of Georgia, Department of Health, Vital Records*

**Project Title** EVRS Planning Project

**Project Dates** 2/ 2011 to 7/2011

QuantumMark, LLC worked with the State of Georgia assist with preparing for and procuring software for a web-based vital records system. The scope of the project included:

- ▶ Creating a Comprehensive Project Plan;
- ▶ Assessment of current “as is” baseline functions;
- ▶ Developing requirements for EVRS including birth, death, marriage and divorce events;
- ▶ Drafting a report detailing minimum EVRS requirements;
- ▶ Conducting JAD sessions to review the model processes and requirements and make changes based on the feedback of the subject matter experts;
- ▶ Developing an Implementation Project Plan;
- ▶ Developing an RFP for procurement of the EVRS;

*Commonwealth of Pennsylvania, Bureau of Health Statistics and Research*

**Project Title** EDRS Implementation Planning Project

**Project Dates** 2/ 2010 to 6/2010

The Commonwealth of Pennsylvania, Bureau of Health Statistics and Research (BHSR) had already selected a vendor to implement their EBRS and were ready to begin planning for the implementation of EDRS. QuantumMark was selected to facilitate the process.

- ▶ Standard templates provided by the Bureau of Information Technology were used to capture business rules;
- ▶ Existing documentation on EDRS requirements was reviewed;
- ▶ QuantumMark templates were used to prepare the model set of process flows and requirements in the standard format provided;
- ▶ JAD sessions were held onsite to review the model processes and requirements and make changes based on the feedback of the BHSR subject matter experts; and,
- ▶ Feedback was incorporated into the standard templates and submitted for review and approval.

### *State of Tennessee, Department of Health*

**Project Title** Tennessee Vital Records Information System Management (VRISM)

**Project Dates** 1/7/08 to 3/31/09

The State of Tennessee, through a competitive RFP process, awarded QuantumMark, LLC with a contract to supply project management and subject matter knowledge in process reengineering and planning for and procurement of an electronic vital records system. As part of the fixed price, fixed deliverable project QuantumMark:

- ▶ Developed a comprehensive project management plan that included:
  - Detailed Work Plan
  - Communication Plan
  - Quality Management Plan
  - Risk Management Plan
- ▶ Prepared bi-weekly status reports;
- ▶ Presented to the Project Steering Committee twice per month and offered advice and guidance to the committee as requested;
- ▶ Assessed the current “as is” baseline functions and identification of barriers and opportunities for improvement;

- ▶ Documented issues related to the State's organizational structure, regulations, policies, and procedures;
- ▶ Facilitated development of the "to be" vision;
- ▶ Prepared detailed functional (business) requirements underlying the new vision;
- ▶ Prepared technical requirements underlying the new vision including enabling technologies, integration with other systems and interfaces;
- ▶ Facilitated discussions/decisions of implementation options and documented scope for each phase of the implementation;
- ▶ Prepared the Master Work Plan for the phased implementation;
- ▶ Prepared a Project Proposal and Cost Benefit Analysis according to the State format and procedure; and,
- ▶ Prepared the Scope of Work and Evaluation Criteria to be included in the Request for Proposal for procuring the services of the COTS vendor.

The deliverables produced during the project provided the State with the tools necessary to make an informed selection of a COTS vendor for their electronic vital records system.

*State of Oregon, Department of Human Services*

**Project Title**                      Marriage and Divorce Requirements Project

**Project Dates**                      12/17/07 to 6/30/08

The contract for the Oregon Marriage and Divorce Requirements project was awarded to QuantumMark as a result of a competitive procurement among the vendors on the approved vendor list. The purpose of the project was to extend the reengineering effort already completed under a previous contract for the electronic death registration system (EDRS) to add requirements for the marriage and divorce events.

Under the contract, QuantumMark:

- ▶ Conducted a project kickoff meeting to define project scope, goals, metrics, assumptions, and constraints;
- ▶ Developed a detailed work breakdown structure, set predecessors and durations and assigned resources;
- ▶ Produced a written work plan;

- ▶ Baselined the project schedule and tracked progress against the baseline;
- ▶ Participated in weekly project status update meetings and provided a weekly written status report;
- ▶ Assessed the current marriage and divorce environment including work flow analysis;
- ▶ Facilitated discussions/decisions on desired future environment;
- ▶ Collected business requirements from internal and external stakeholders;
- ▶ Validated business requirements and developed buy-in through a series of focus groups held in various regions of Oregon; and
- ▶ Contacted/benchmarked other states with marriage and divorce projects to survey them on their goals and approach and produce a document comparing the various approaches.

*State of Nevada, Department of Health and Human Services, Bureau of Health Planning and Statistics, Office of Vital Records*

**Project Title** Vital Records Reengineering Project

**Project Dates** 9/4/2001 – 6/30/2002

The Office of Vital Statistics desired to reduce process time, eliminate backlogs, improve data quality and increase access to data for analytical purposes by implementing a central vital records system that would be shared with hospitals, funeral directors, physicians, coroners, counties and the State.

QuantumMark was selected to assist with the Planning Phase of this re-engineering effort. The project included:

- ▶ Providing project management
- ▶ Assessing the “As Is” environment for the vital events of birth, death, marriage and divorce
- ▶ Facilitating sessions with subject matter experts from the Bureau, the counties, and other stakeholder groups envision the future environment
- ▶ Conducting Joint Application Design (JAD) sessions to define the business and system specifications for the new system.
- ▶ Organizing focus groups comprised of management level representatives for each stakeholder group, receive feedback, and bring about buy-in and support.

- ▶ Developing a new data model to support the integrated approach to processing vital records
- ▶ Preparing a data conversion plan
- ▶ Developing requirements for a data warehouse for over 40 health-related databases including vital records
- ▶ Researching commercially available software products to support the vital records function as well as potential transfers from other states.
- ▶ Producing recommendations report, implementation plan and budget

*State of Nevada, Department of Health and Human Services, Bureau of Health Planning and Statistics, Office of Vital Records*

**Project Title** Vital Records RFP & Vendor Selection

**Project Dates** 11/22/2004 – 12/31/2005

Because of funding limitations, the Office of Vital Records had to put their plans to implement a new electronic system on hold. When SSA funding became available in 2004, the re-engineering project was restarted.

This phase of the project included:

- ▶ Providing project management
- ▶ Assisting the Bureau to prepare the successful response to the 2005 SSA RFP for implementation of the OVS that generated the funds to move forward
- ▶ Updating the functional and technical requirements from the previous project to incorporate the NAPHSIS use case models, and Standards and Guidelines
- ▶ Producing the RFP for the procurement of software and services from vendors with commercially available systems
- ▶ Providing support to the vendor selection committee and contract negotiation assistance

*State of Nevada, Department of Health and Human Services, Bureau of Health Planning and Statistics, Office of Vital Records*

**Project Title** Vital Records System Implementation

**Project Dates** 1/1/2006 – 12/31/2007

Following selection of a software vendor to supply a new web-enabled vital records system, the Office of Vital Records was ready to begin system implementation.

Our role included:

- ▶ Developing an integrated Project Plan that incorporated vendor and State tasks on a single schedule
- ▶ Providing on-going project management including managing the budget
- ▶ Keeping DoIT apprised of project status
- ▶ Participating in software vendor meetings and reviewing vendor deliverables
- ▶ Managing Gap Analysis
- ▶ Advising the State during system configuration activities
- ▶ Managing the User Acceptance Testing Process
- ▶ Organizing the pilot test and manage go live
- ▶ Developing deliverables to comply with the SSA contract

*State of Nevada, Department of Health and Human Services, Bureau of Health Planning and Statistics, Office of Vital Records*

**Project Title** Vital Records Statewide System Rollout

**Project Dates** 1/1/2008 - 7/18/2008

Following successful implementation of the new web-enabled vital records system the Office of Vital Records was ready to rollout out the new system to users statewide. These included the counties, hospitals, funeral homes, physicians and coroners.

Our role in the project was:

- ▶ Preparing the post-implementation SSA deliverables
- ▶ Tracking bugs and working with the State and vendor to prioritize defect resolution
- ▶ Developing a statewide rollout strategy and plan
- ▶ Assisting the State to prepare end user training materials and training plan
- ▶ Assisting the State to train end users
- ▶ Facilitating resolution of operational issues at end user locations
- ▶ Kickstart the next phase of implementation, electronic birth reporting

### **3.1.3 Staff Experience**

Please see Appendix D for Staff Resumes

### **3.1.4 Documentation of Work Projects Specified in 3.1.1**

#### **3.1.4.1 Reference Letters**





Eric J. Holcomb  
Governor

Jerome M. Adams, MD, MPH  
State Health Commissioner

March 3, 2017

To Whom It May Concern:

QuantumMark, LLC was engaged in March of 2016 to provide consulting services to the State of Indiana for drafting an RFP and management of implementation of a new web-based Vital Records system.

From project initiation activities through the current vendor selection process, QuantumMark has provided quality input for assessment of our current environment, developing a detailed comprehensive project management plan with timeline, resources and a full work-breakdown structure. These activities allowed us to move forward with plans for the new environment, the drafting of system requirements specific to Indiana and the development and issuance of a software vendor RFP. Each of QuantumMark's deliverables has been timely, easy to understand and with clear detail for task achievement.

Currently, we have selected our vendor through an evaluation and negotiation process with QuantumMark's assistance. Achieving these objectives has been made easier with QuantumMark's expertise. We are pleased to have QuantumMark onboard to provide project oversight for the implementation phase of our new Vital Records system.

QuantumMark has helped us achieve our goals and stay on time and budget. They have the expertise and skill in this industry that makes them the right choice for any state or jurisdiction seeking to implement a Vital Records system.

Please feel free to contact me if you have questions or would like additional information.

Sincerely yours,

Brian Carnes  
State Registrar  
Indiana State Department of Health



2 North Meridian Street · Indianapolis, IN 46204  
317.233.1325 tdd 317.233.5577  
www.statehealth.in.gov

To promote and provide  
essential public health services.



February 28, 2017

RE: Reference for QuantumMark, LLC

To Whom It May Concern:

This letter is to provide a reference for QuantumMark, LLC.

QuantumMark was hired in November of 2014 to assist our office with planning for and procurement of a web-based electronic vital records system to include registration, amendment and issuance of birth, death, fetal death, ITOP, marriage and divorce events, as well as fee collection. QuantumMark has also been contracted to provide oversight for the software implementation phase of the project.

Since project initiation in 2014, QuantumMark has proven to be a skilled resource in providing guidance and assistance by conducting an assessment of vital records functionality, working with staff to develop a clear picture of our goals and process flows for a new environment and for successful buy-in to and implementation of a new electronic vital records system.

QuantumMark brings to the table best practices developed through their work in other states as well as their relationships throughout the entire vital records community. QuantumMark has tools and templates that helped us develop state-specific system requirements. NAPHSIS Use Case Models form the basis for all of QuantumMark's requirements templates which ensures our new system will meet national standards. The requirements became part of the software vendor RFP that QuantumMark developed in conjunction with our agency and state procurement office. QuantumMark's assistance in the RFP development and procurement process has been invaluable.

QuantumMark will continue to provide their expert oversight for development and implementation of our new system to facilitate building a new environment and bringing stakeholders onboard with the system. QuantumMark made a daunting process much easier to bear with their many years of experience and the relationships they have in this industry.

Please feel free to contact me if you have questions or would like additional information.

Best Regards,

A handwritten signature in black ink, appearing to read "Shae R. Sutton".

Shae R. Sutton, PhD  
Assistant State Registrar  
Director, Public Health Statistics and Information Services  
[suttonsr@dhec.sc.gov](mailto:suttonsr@dhec.sc.gov)  
803-898-1808



THE STATE  
of ALASKA  
GOVERNOR BILL WALKER

Department of  
Health and Social Services

DIVISION OF PUBLIC HEALTH  
Health Analytics & Vital Records

P.O. Box 110675  
Juneau, Alaska 99801-1149  
Mail: 907.465.3391  
Fax: 907.465.3618

February 28, 2017

To Whom It May Concern:

From 2009 to 2015, QuantumMark provided project oversight to the Alaska Electronic Vital Records System project, a web-based vital records system that also includes Medical Marijuana Registry. The project came in under budget and was fully implemented a year ahead of schedule. It is one of the Department's IT project successes. Oversight provided by QuantumMark for this project included:

- Creating a Comprehensive Project Plan;
- Assessment of current "as is" baseline functions;
- Developing requirements for EVRS including birth, fetal death, death, marriage and divorce events;
- Drafting a report detailing minimum EVRS requirements;
- Conducting a cost-benefit analysis of potential replacement EVRS and submitting report;
- Developing an Implementation Project Plan;
- Developing an RFP for procurement of the EVRS;
- Assisting the State with the procurement of an EVRS vendor;
- Assisting with contract negotiations with the selected vendor; and,
- Providing technical assistance to the State BVS office during the implementation phase.

With QuantumMark's aid, the end result is a system that functions properly and has elevated agency operations as a whole. Clerical functions, such as ensuring that state file numbers are stamped and filed orderly, have largely been delegated to the system and staff are building on higher-level skills and abilities that result in advances in Alaska vital records and public health statistics. Without QuantumMark's guidance and support, these advances would not have been possible.

If you have any questions or comments, please feel free to contact me at the number, above.

Sincerely,

  
Heidi Lengdorfer, MPH

**NAPHSIS**  
Protecting Personal Identity  
Promoting Public Health

962 Wayne Avenue, Suite 701  
Silver Spring, MD 20910  
www.naphsis.org

March 2, 2017

To Whom It May Concern:

The National Association for Public Health Statistics and Information Systems (NAPHSIS) is a non-profit professional association of 57 jurisdiction vital records and public health statistics offices in the 50 states, New York City, District of Columbia and five US territories. Our mission is to provide national leadership and advocacy on behalf of our members to ensure the quality, security, confidentiality and utility of vital records and health statistics, as well as their integral role within health information systems for monitoring and improving public health.

As part of the goal to meet increasing demands for information system integration, NAPHSIS developed and implemented the Electronic Verification of Vital Events (EVVE) system that allows immediate confirmation or denial of birth or death information presented by an applicant anywhere in the nation. At the time of this project, the EVVE system was used by several federal and state agencies but there were no commercial users.

In 2012 NAPHSIS contracted with QuantumMark, LLC, a NAPHSIS Corporate Partner, to work with NAPHSIS to prepare a Business Plan and a Marketing Plan specifically focused on increasing the volume of electronic verification transactions processed by the EVVE system. The project resulted in a Business and Marketing Plan that provided improved understanding of the technical, market, organizational and financial feasibility of expanding EVVE capabilities and markets and a roadmap for NAPHSIS to capitalize on their investment in EVVE.

Six specific recommendations were included in the Business and Marketing Plan which was presented to and approved by our Board of Directors. Since the completion of the project with QuantumMark NAPHSIS has made significant progress in implementing the Plan recommendations. We now have selected a strategic technology partner to help us build and maintain a more robust infrastructure, developed new product offerings geared to identified high potential target markets, launched a marketing campaign, worked with our membership to increase the number of birth and death events available electronically and improved our pricing model.

After the board reviewed the Plan, Jennifer Woodward, Oregon State Registrar, stated "QuantumMark has done a great job on this project. It is always a pleasure working with you. It is hard to believe 10 years ago Quantummark was doing Oregon's EDRS requirements. I, along with NAPHSIS, look forward to partnering with you again in the future."

The work of QuantumMark was instrumental in plotting our course to achievable

results. We are grateful for their work on this project and the support that they give every year as a Corporate Sponsor of NAPHSIS. We look forward to an opportunity to work with them again.

Sincerely,



Shawna Webster, CAE  
Interim Executive Director  
NAPHSIS





The Institute of Management Consultants USA, Inc. (IMC USA), an ISO/IEC 17024:2003 Certifying Body, certifies that

**Suzanne March**

has met the requirements of the International Council of Management Consulting Institutes (ICMCI) CMC Certification Scheme in the Field of Management Consulting and IMC USA's CMC<sup>®</sup> Competency Framework - Certification Scheme as of June 18, 2010 as a

**Certified Management Consultant<sup>®</sup> (CMC<sup>®</sup>)**

Certificate number: [REDACTED] Initial Award December 15, 2001 Expires: June 30, 2017

*Kerani Haechler*

Chair, Board of Directors  
IMC USA

Chair, CMC<sup>®</sup> Certification Committee  
IMC USA

This Certificate is the property of IMC USA. CMC<sup>®</sup> is a registered certificate for IMC USA in the U.S. Patent and Trademark Office.  
4420 PEA Boulevard, Suite 600, Palm Beach Gardens, FL 33410, 561-472-0553 www.imcusa.org



**REQUEST FOR PROPOSAL**  
WV Department of Health and Human Resources  
Bureau for Public Health  
EHP170000001

*List project goals and objectives contained in Section 4, Subsection 4:*

**Section 4**

**Section 4, Subsection 4.1:**

- 4.1. Project initiation and development and production of a comprehensive project management plan for Phase I -** The project initiation phase is necessary to arrive at the initial project planning and development work plans to map out the first steps based on the initial data gathering. The project initiation phase should be agreed upon by Vendor and Agency regarding the format, timing, transmission, and other particulars, of the other project deliverables throughout the project. Deliverables for this goal should include:
- 4.1.1. Master Work Plan –** The vendor should include all known tasks, duration estimates and resource loading for the duration of the project, including the critical path time line. The Master Project Work Plan should reflect the schedule to be determined in conjunction with the Agency during the Project Initiation meeting and shall cover the entire project. After creation, the Master Project Work Plan should be reviewed weekly with the Agency project manager, with updated information reflected throughout the lifecycle.
  - 4.1.2. Communications Management Plan –** The vendor should demonstrate an understanding of the effect of communication upon the success of the project by providing a detailed Communications Management plan. The plan should detail the types of information disseminated, along with the frequency, method of dissemination.
  - 4.1.3. Quality Management Plan –** The vendor should demonstrate an understanding of project quality management by outlining a plan to identify the quality requirements of the project, and the inputs, tools, techniques, and outputs used to monitor and control the quality management of the project.
  - 4.1.4. Risk Management Plan –** Similar to the Quality management plan, the vendor should demonstrate an understanding of project risk management by outlining a plan to identify possible risks, assessment of the identified risks' effect upon the project, and develop response strategies for those identified.

***Vendor Response:***



## Section 4

### 4.1 Project Initiation, Development, and Comprehensive Project Management Plan for Phase 1

QuantumMark will provide the services and deliverables listed in Section 4, Subsection 4.1.

#### *What Does the Deliverable Provide?*

The Comprehensive Project Management Plan is the document that defines the scope of our project, assumptions and constraints, deliverables, roles and responsibilities, project governance, and project processes. It also includes the approved baselined project schedule. The document is used throughout the project as the key reference for scope and schedule management.

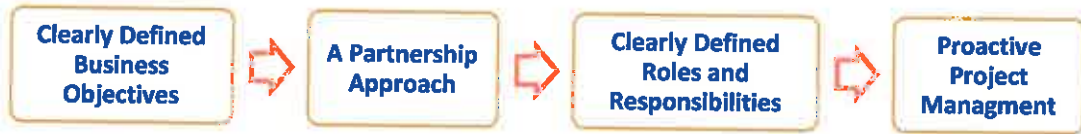
#### *Why Is This Important?*

Project management is the process used to deliver a project's end product on time, within budget, according to specifications, and at a level of quality that meets professional standards and management expectations. Comprehensive planning and project management are essential elements to the success of all projects.

A formalized project management methodology is often cited in studies as the difference between successful and unsuccessful projects. In successful projects, a detailed and documented project plan facilitates consistent communication, accountability and awareness of project constraints. The Plan helps to answer questions such as:

- ▶ Is that activity in scope?
- ▶ Who is responsible?
- ▶ When will that information be available?
- ▶ Are we on time?

When the process of developing the Plan is interactive, mutual understanding and agreement can be attained; creating a partnership to proactively manage the project.



### *How Do We Do It?*

The guidelines established by the Project Management Institute (PMI®) serve as the foundation for our Project Management Methodology. Standards within the methodology ensure quality outcomes, while allowing for individual components to be sized according to the specific characteristics of each unique project.

During Project Initiation, QuantumMark will work with the State Project Sponsor, State Project Manager and other key staff members to confirm and gain agreement on the business objectives, project scope, constraints, assumptions, success criteria, and risks associated with this project.



Project Initiation is also the time to establish the process for on-going management of the Project. Agreement will be gained for the processes associated with status reporting, issue resolution and risk management. Agreeing on and establishing these procedures early in the Project will lay the foundation for effective project management to occur throughout the life of the Project.

QuantumMark will hold regular status meetings with the State. The purpose of these meetings is to update the State on the progress of the project, identify requirements for upcoming State resources, and discuss issues and risks that may be hindering progress or jeopardizing meeting project milestones. QuantumMark will work with the State to set up a regular meeting time. A standing agenda will be provided to the State. Meetings will be held via GoToMeeting.

The Comprehensive Project Management Plan consists of four planning components, the Master Project Work Plan, Communication Management Plan, Quality Management Plan and Risk Management Plan.

- A. Master Project Work Plan – The Master Work Plan is comprised of two parts: 1) a narrative document similar to a project charter, and 2) an MS Project Schedule. The narrative defines the goals, objectives, scope, budget, assumptions and constraints, and governance of the project. The detailed schedule outlines all the tasks, work breakdown structure, resources, time and duration estimates and critical path necessary to complete the project in the desired timeframe.
- B. Communication Management Plan – Effective communication is essential for the success of any project. QuantumMark employs the Communication Management Plan to specify the methods that will be used for all communications about the Project. This will include information flowing into and out of the Project as well as communications among the Project team. Topics may include project team status meetings; Project Steering Committee meetings, meeting minutes, presentation formats, email protocol, electronic storage of Project documents, communications with team members, communication with stakeholders, and the use of a website to communicate key elements of the Project to the general public. Tasks will be denoted as to whether they belong to QuantumMark or the State. As with other Project documents, the Communication Management Plan is a living document that will be updated periodically throughout the life of the project.

The Communication Management Plan will include:

- 1) The intended audiences
- 2) The types of information to be disseminated;
- 3) The frequency at which information shall be disseminated;
- 4) The method by which the information shall be disseminated; and
- 5) The source of information.

- C. Quality Management Plan – This plan will define the quality objectives (completeness, correctness, and usability of deliverables) of the Project. This document will provide the metrics by which progress on the Project will be measured. The plan will cover the definition of each metric and the method for collection and reporting. The tasks needed to adhere to the quality management guidelines will be incorporated in the project plan.

Effective internal quality assurance helps minimize project risks and improves the final outputs of the project when it is designed into the project methodology. To prevent rework, quality assurance must be integrated into how a project is managed.

A quality project can only be achieved if all participants have a clear and common understanding of the Project objectives, outcomes and benefits, and how they will be measured. QuantumMark will facilitate discussions among key participants that will result in agreement as to the quantifiable outcomes (key performance indicators) expected. Agreements will be clearly documented and be incorporated into the Quality Plan.

Quality management practices will be directly leveraged from our own Project Management Methodology and will focus on three principle aspects: deliverable review, issue resolution, and change control.

*Deliverable Review* - Deliverables serve as major checkpoints for evaluating quality. QuantumMark and the Project Sponsor will agree and document the mechanisms by which deliverables will be reviewed and approved. QuantumMark's partnership approach to projects mandates that deliverable development be a joint venture between our clients and us. If quality is truly built into every process, deliverables can only be of the highest quality if we have gained the project's staff input before the deliverable is finalized. This interactive approach provides an opportunity to align expectations, agree upon format and content prior to meeting our contractual obligations. The result is a better quality output that will require less rework and will be of greater value to the State.

*Issue Resolution* - QuantumMark will implement an Issue Tracking Log that will be used throughout the project to document and track issues as they

arise. QuantumMark and the Project Sponsor will monitor the Issue Log on a regular basis to ensure that:

- ▶ Proper communication of issues occurs
- ▶ Decisions are made on a timely basis to maintain the Project schedule and to ensure a thorough understanding of the facts and risks
- ▶ Issues are escalated appropriately when resolution cannot be reached at the Project level.

Issue resolution meetings will be held in conjunction with the bi-weekly status meetings. Issues critical in nature will be escalated immediately to the Project Sponsor.

*Change Management* - Some issues may raise concerns about project scope. Changes to the project scope generally occur for three reasons:

- ▶ Unforeseen external events impact the Project objectives
- ▶ A task in the Project Plan revealed unexpected information that could impact the Project
- ▶ New ideas or suggestions for improvement surface that would have a significantly positive impact on the outcome of the Project

QuantumMark will utilize a formal Change Management Process that includes evaluating each potential change as to benefits, resource utilization, costs and impact on the schedule. During Project Initiation QuantumMark will review processes with the Project Sponsor and make any necessary adjustments to conform to State processes and procedures.

- D. Risk Management Plan – Risk Management is an effective way to manage uncertainties and doubts about the project. Risk can never be abolished, but can be reduced to an acceptable level. Risk Management is a must for any project and it has to begin during the project initiation and continue throughout the project lifecycle. The purpose of developing a Risk Management Plan is to determine the approach for cost-effectively recognizing and mitigating project risks.

QuantumMark, LLC agrees with the Project Management Institute's view of risk management. The Risk Management Plan for this Project will include:

- ▶ Risk Planning and Preparation;
- ▶ Risk Identification;
- ▶ Risk Assessment and Analysis;
- ▶ Developing Response Strategies; and
- ▶ Risk Monitoring and Reporting.

Brainstorming is the method used for risk identification because of its capability to identify a wide and diverse range of risks. In preparation for the brainstorming session QuantumMark prepares a list of potential risk factors based on experience with other similar projects. Team members will discuss the list and add, delete or modify as required to reach consensus about the true nature of risk for the project.

Risk quantification is the assessment of the identified risks based on the probability that the risk will occur and the impact to the project if it does occur. This process is used to screen out minor issues and focus the attentions of the project team on the highest risks. During the brainstorming session the team will assign a score of high, medium or low to both the probability of each risk occurring and the potential impact of the risk to the project. The combination of the two scores for each risk determine the amount of planning that is required to proactively prepare for the risk.

Once the risks are quantified, a risk response will be identified for any risks that are considered significant. The degree of planning for the risk depends on the combined rating of probability and impact. The following table illustrates the degree of planning for each risk rating:

<b>High</b>	Define a Mitigating Strategy	Define a Mitigating Strategy and Outline a Contingency Plan	Mitigation Strategy and Produce a Contingency Plan
<b>Medium</b>	Define a Mitigating Strategy	Define a Mitigating Strategy	Define a Mitigating Strategy and Outline a Contingency Plan
<b>Low</b>	Treat as an Project Assumption	Define a Mitigating Strategy	Define a Mitigating Strategy
	<b>Low</b>	<b>Medium</b>	<b>High</b>
<b>Severity Factor</b>	<b>Probability Factor</b>		

Regular monitoring and review of risks ensures that new risks are detected and that all risks are effectively managed. Risk response control involves the execution of the Risk Management Plan in order to counter risk occurrences during the life of the project. The goal is to keep risks under control and invoke contingency plans, if required. Regular surveillance and proactive project management are the keys to risk response control. Risk management will be a part of every status meeting agenda.

The Comprehensive Project Management Plan will be submitted to the State for formal review and, once approved, will be used for the remainder of the project as the guide to all project activities.



## REQUEST FOR PROPOSAL

WV Department of Health and Human Resources  
Bureau for Public Health  
EHP1700000001

### Section 4, Subsection 4.2:

Assessment and documentation of the current work environment to provide background of current systems and processes to better frame the objectives of the re-engineering process in total. It is important in this re-engineering project, both to the Agency and to any future Vendor, to know where the Agency is starting from - the current operational environment. As such, it is necessary to document all existing processes, identify the strengths and weaknesses of both processes and infrastructure that exist at the beginning of the project so as to capitalize and build on the strengths and improve or mitigate the weaknesses. A formal assessment of this nature provides documentation for the need for new systems to be developed and implemented. This activity sets the stage for "future visioning", so as to describe the anticipated environment at the endpoint of the project. The necessary steps in-between, the "roadmap", can then be developed. The vendor should include in this assessment, data gathering and group discussion with key Agency staff as well as any stakeholders as may be necessary. The Vendor proposal should demonstrate an understanding of the assessment process and a detailed plan of how the following deliverable goals could be documented.

- 4.2.1. All current processes of the Agency related to the issuance, registration, maintenance, amendment, imaging, data extracts, audit trails, accounting, and issuance of vital records and reports and any notable strengths and weaknesses.
- 4.2.2. Transaction volumes of incoming documents and outgoing certified copies.
- 4.2.3. The stakeholders of the system of vital statistics.
- 4.2.4. Strengths and weaknesses of the current infrastructure supporting or available to the system of vital statistics.
- 4.2.5. All Current Workflows

### *Vendor Response:*

## 4.2 Assessment and Documentation of the Current Work Environment

QuantumMark will provide the services and deliverables listed in Section 4, Subsection 4.2.

### *What Does the Deliverable Provide?*

The Assessment of the Current Environment Deliverable provides an understanding of the current state of vital records in West Virginia. This activity provides insight and



understanding into the unique aspects of how vital events are handled in West Virginia. The deliverable provides a description of the current processes, a description of the current technical environment, transaction volumes, users by stakeholder group, and an inventory of the vital records and vital statistics application systems and databases.

### *Why Is This Important?*

There are several reasons why this activity is important.

- ▶ Informs QuantumMark of unique aspects of registration, issuance and maintenance of vital records in the State of West Virginia that may differ from other states;
- ▶ Focuses vital records and vital statistics staff on what in the current environment works and does not work and why, leading to consensus on the need for change and the goals for a new system;
- ▶ Creates a foundation for developing the agenda for the JAD sessions that will include the time necessary to delve into unique requirements, helping to ensure that the technical and business requirements are complete;
- ▶ Builds justification for the implementation of a new system;
- ▶ Provides background, volume and technical documentation that can be incorporated into the RFP; and,
- ▶ Serves as a reminder, during the implementation phase, as to why key decisions were made.

### *How Do We Do It?*

Prior to our first onsite visit, QuantumMark will ask for and review West Virginia Vital Records statutes, regulations, administrative codes, policies and procedures in order to understand the Vital Records nuances in West Virginia. Shortly thereafter we will schedule time to be onsite in Charleston to:

- ▶ Interview key internal staff to gain an understanding of the work flow and specific jobs performed by the vital records and vital statistics areas;
- ▶ Review system documentation and interview key staff to gain an understanding of the current level and type of automation in the vital

records and vital statistics areas; and, begin the process of learning the State IT standards with regard to hardware, software, and security.

- ▶ Review current technology skill levels within the Department;
- ▶ Interview key external agency stakeholders to gain knowledge of the current interfaces with the vital records process; and,
- ▶ Document the current workflows for all processes within the scope of this project.



While onsite, QuantumMark will conduct group sessions to solidify our mutual understanding of the current environment and to identify opportunities for improvement associated with the current processes. The method that we employ for documenting the current vital records environment is very visual in nature. Using large rolls of butcher paper QuantumMark works with the State staff to draw out each process step by step. Copies of input screens, documents and reports are glued on the butcher paper at the appropriate place in the workflow to provide detail on both workflow and data requirements. Decision points, process times, elapsed times, hand-offs, volumes, and known issues are also noted. This very visual representation is essential to quickly generating a common understanding of the current environment, gaining an understanding of any unique business specifications and facilitating acceptance of the need for change.

The consultants extract the key findings from the “brown paper” to identify improvement opportunities that may be incorporated into the new system. A narrative overview of the current processes and the findings are documented in the Current Assessment Deliverable.

Similarly, on the technical side QuantumMark will set up a series of meetings with IT staff to understand and document the current technical environment. Meetings will center around a variety of topics such as: understanding and documenting current State data center standards, infrastructure, state security standards, policies regarding equipment sharing, protocols, organizational structure, processes that must be adhered to when procuring and installing a new system, lessons learned from previous projects and current technological challenges and issues being faced by IT.

QuantumMark will work with State staff to identify and document the current systems used by the vital records and vital statistics staff. This will include databases to Excel spreadsheets. QuantumMark will conduct a skill assessment of technical staff to understand where training may be required to eliminate skill gaps that could arise based on the various vendor technologies.

QuantumMark will create a deliverable document that summarizes the information learned through assessing the current environment. Additionally, we will document other information that we learn such as potential short-term process improvements, lessons learned or other recommendations that may be of benefit to the State even before the implementation of the new system.

**REQUEST FOR PROPOSAL**  
**WV Department of Health and Human Resources**  
**Bureau for Public Health**  
**EHP1700000001**

**Section 4, Subsection 4.3:**

**4.3. Development of a detailed system and business requirements report for new systems and their implementation.** – This set of related activities and the written/electronic reports will form the key component of the Phase I planning and project development project. The purpose of the activities is to formulate and describe in detail the new processes and systems sought by the Agency. Through “future visioning” activities, a clear and accurate vision can be developed and explained to all stakeholders and this vision can be further incorporated into later deliverables. It is from the detailed system and business requirements report and any related resources constructed during the activity, such as electronic spreadsheets, that a detailed Request for Proposal for Phase II can be constructed, solicited RFPs can then be evaluated and scored for award, and progress and project deliverables can be monitored for compliance with the RFP. Vendor Proposal should demonstrate an understanding of business requirement development and a detailed plan of how the following deliverables for this goal could be met:

4.3.1. “Future visioning” - The Vendor should facilitate discussions and decisions on the desired future system of vital statistics environment and provide a high-level written overview at the conclusion of this activity.

4.3.2. Determination and documentation of new process flow.

4.3.2.1. Implementing and conducting an internal workgroup made up of key vital records and vital statistics staff to envision how the new electronic systems should work in terms of process and workflow.

4.3.2.2. Process flows should be documented.

4.3.3. Implementing, leading and documenting on-site joint project planning sessions as described in section 5.3 with vital records and statistics staff and other internal and external stakeholders as necessary to formulate and describe in detail the new systems and processes.

4.3.4. Conducting informational sessions with one or more Agency staff to be held with external stakeholders in five selected locations as defined in section 5.3. The purpose of the informational sessions should be to both inform stakeholders and seek input/feedback on business and/or functional requirements created up to that point out of internal workgroups and requirements gathering sessions which may be used to further define the business and technical requirements.

4.3.5. Production of a Business and Technical Requirements Report for approval by the Agency should include:

4.3.5.1. A narrative and graphical overview of the new vital records processes which identifies all major functional modules.

4.3.5.2. A business functional specifications matrix (in Excel) that details in written form each major step for all business

processes and the associated requirements and business rules either mandatory or recommended.

- 4.3.5.3. A general specifications matrix (in Excel) that details general, technical, and interface requirements.
- 4.3.5.4. A workflow matrix (in Excel) that identifies all the work queues needed for each type of user of the system.
- 4.3.5.5. A reports matrix (in Excel) to describe the various reports that the systems need to generate, and,
- 4.3.5.6. A system documentation matrix (in Excel).

***Vendor Response:***

### **4.3 Development of a Detailed System and Business Requirements Report for New Systems and Their Implementation**

QuantumMark will provide the services and deliverables listed in Section 4, Subsection 4.3.

#### ***What Does the Deliverable Provide?***

The system and process reviews conducted during the assessment of the current environment will provide a wealth of information with which to begin building the system requirements and the desired functionality of the new web based vital records information system. Utilizing this information in addition to best practices and information from the NAPHSIS Use Case Models, QuantumMark will work with the vital records and vital statistics staff and stakeholders to develop detailed Business and Technical Requirements.

The Business and Technical Requirements Report will include the following sections:

- ▶ A narrative and graphical overview of the new vital records processes identifying major functional modules;
- ▶ A Business Functional Specifications Matrix (in Excel) that details in narrative form each major step in the business process and the associated requirements and business rules notated as mandatory or recommended;

- ▶ A General Specifications Matrix (in Excel) that details general, technical, and interface requirements;
- ▶ A Workflow Queue Matrix (in Excel) that identifies all the work queues needed for each type of user;
- ▶ A Reports Matrix (in Excel); and,
- ▶ A System Documentation Matrix (in Excel).

### *Why Is This Important?*

Development of detailed business and system requirements is one of the key component to a successful implementation project. This deliverable provides benefits at every stage of the project. Specifically, the development of detailed requirements:

- ▶ Exposes differences of opinion on what the new system should achieve and providing a mechanism to build consensus for the best solution prior to selecting a vendor;
- ▶ Provides a clear statement of the vision that can be communicated to all interested parties;
- ▶ Provides a process to ensure that the definition of functions to be provided by the vendor is as complete, clear and accurate as possible;
- ▶ Creates an Excel formatted list of business and technical requirements that can be attached to the RFP, electronically completed by the vendors and scored electronically as part of the overall proposal evaluation;
- ▶ Facilitates gap analysis discussions with the vendor at the initiation of the implementation phase to produce the final documentation of product scope that the vendor will contractually be held accountable for;
- ▶ Aids in managing the scope and minimizing change orders from the vendor during implementation;
- ▶ Assists in preparing User Acceptance Test Scripts;



- ▶ Provides a mechanism to trace the delivery of requirements by the vendor to the agreed scope statement and determine when to issue final approval for the system.

In our experience, there is no single deliverable that produces more significant benefit than the detailed requirements deliverable document. Conversely, projects that did not go through this process, defer decisions about requirements to the implementation phase. This dramatically slows the pace of the implementation and exposes the project to conflicts about what is in and out of scope between the State and the vendor. Change orders are more likely and typically are of a higher dollar value.



### *How Do We Do It?*

This is an area where QuantumMark’s knowledge and experience provides a tremendous advantage to your staff. QuantumMark has created a series of model work flows and requirements templates based on the use case work done by NAPHSIS as well as our experiences from other states. These templates allow us to quickly assist West Virginia in determining and documenting the “new” process flows without re-inventing the wheel. Once we complete the assessment of the current environment we will modify our process models and requirements templates, as necessary, to address the unique aspects of West Virginia Vital Records.

The revised process models will be the starting point for internal visioning sessions with vital records and vital statistics subject matter experts. The visioning group will be comprised of Vital Records and Statistics managers and supervisors. The Visioning group will define, at a conceptual level, how the EVRS system will work from a process and work flow perspective and how it will differ from the current system. Once the visioning is complete the process flows will be documented in Visio and a brief narrative description will be written to accompany each Visio process flow.



Joint Project Planning (JPP)/Joint Application Design (JAD) sessions will then be held with staff and stakeholders to validate the process flows and define the associated detailed functional and technical requirements. QuantumMark's revised set of requirements will be the basis for these discussions.

To most effectively review and arrive at West Virginia specific specifications we will conduct JAD sessions by functional areas. Topics will be arranged in such a manner as to most effectively use the time of the staff and stakeholders. Experts will only need to attend the sessions for which they have knowledge and experience. Specifically, the attendees will:

- ▶ Represent both line and supervisory levels;
- ▶ Represent external stakeholders as appropriate to the topic;
- ▶ Include Vital Records and Vital Statistics personnel as appropriate to the topic; and,
- ▶ Include IT personnel when discussing general system requirements and interfaces to systems that will not be replaced by the EVRS system.

The functional and technical requirements will be updated from the discussions and distributed to a group of subject matter experts for review and comment on a topic by topic basis. All system requirements will conform to the State technology standards.

Once the specific business and system requirements are updated with feedback from the review team, validation sessions will be conducted in the six (6) locations indicated in the RFP. The purpose of the validation sessions is to gain perspective from another group of stakeholders on the new process flows, validate functional business rules and technical requirements specific to external stakeholders, and provide a forum to gain initial buy-in to the EVRS concepts.

The newly envisioned West Virginia specific process flows will be used to facilitate the discussion of how to automate process steps and stakeholder interactions. Additional and / or modifications to business rules will be captured as part of the discussion. Suggested additions, modifications or deletions of business rules will be noted. Following the validation session, QuantumMark will review the suggestions from the stakeholder sessions with the project team to determine if and how to amend the flows and requirements.

QuantumMark will produce the final set of specific business and system requirements. Because of the large number of requirements for each EVRS module, requirements will be submitted to the State for review in segments to allow reviewers to focus on one process at a time. When necessary, phone conferences will be scheduled to further discuss and clarify specific requirements in a given process flow.

After the requirements have been reviewed the final deliverable will be submitted for approval. The document will include:

- ▶ A narrative that explains the methodology used to develop the new processes,
- ▶ A high level description of the new processes,
- ▶ Visio diagrams of the new processes,
- ▶ List of stakeholders supported or affected by the EVRS or by other systems integrated with or interfaced to the EVRS,
- ▶ A Functional Business Specifications Matrix that details in narrative form each major step in the business process and the associated requirements and business rules notated as mandatory or recommended,
- ▶ General Specifications Matrix that contains business rules that are true for the system as a whole. This Matrix is where the technical requirements such as internet access, user roles, logon, security, performance, and data recovery are documented. Additionally, this Matrix contains business rules for functions such as searching, matching, reporting, imaging, data extracts, statistical databases, data quality, data security and electronic signing that apply equally to all events.
- ▶ Queues Matrix that contains by functional area a list of all the queues that will be needed for a user to efficiently work in the system. This is critical as vendors often put a limit on the number of queues they are willing to provide. By detailing the queues it allows the users to rationalize the queues prior to the vendor coming on board and during the bidding process it allows the vendors to provide an accurate price.
- ▶ Reports, Forms and Letters Matrix,
- ▶ System Documentation Requirements Matrix
- ▶ Notes from the Stakeholder Sessions

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**Section 4, Subsection 4.4:**

**4.4. Creation of an “EVRS Minimum Requirements” document** – This document will flow from the information gathered from goals 4.1 through 4.3 that defines and details the “ideal” EVRS for West Virginia. This document should identify the absolute minimum business and functional requirements for procurement and implementation of the EVRS in Phase II, primarily for making a “best fit” for business and functional system requirements in terms of a budget of overall costs with available funds. Vendor proposal should demonstrate an understanding of requirements writing and provide a detailed plan of how the following deliverables for this goal could be met:

- 4.4.1. Defining minimum requirements through group consensus.
- 4.4.2. Identifying various phased deployment strategies and their effect on budgetary costs associated with the rollout of various EVRS modules.
- 4.4.3. Production of a “Minimum Requirements” document which must document the methodology and rationale used for arriving at the minimum requirements and deployment strategies and include group determinations of:
  - 4.4.3.1. Event type implementation order and timing
  - 4.4.3.2. The minimum requirements for system integration and interfaces
  - 4.4.3.3. Data migration strategies for existing data
  - 4.4.3.4. Pilot sites
  - 4.4.3.5. Implementation and roll-out strategies
  - 4.4.3.6. Technology implementation strategies

***Vendor Response:***

## **4.4 Creation of an EVRS Minimum Requirements Document**

QuantumMark will provide the services and deliverables listed in Section 4, Subsection 4.4.

### ***What Does the Deliverable Provide?***

This deliverable sets the focus on State priorities for procuring the EVRS. It is a starting point for aligning desires with budgetary and fiscal year constraints.

### *Why Is This Important?*

Understanding the minimum requirements for implementing each module allows the State to match program needs to available funds. This deliverable provides the foundation for implementation planning and budgeting.

### *How Do We Do It?*

The overall cost of the EVRS implementation is affected by the number of modules purchased at one time, the number of interfaces, integrated systems or enabling technologies that are required, and the strategy for and speed of the statewide rollout. To better understand these dynamics, this task is comprised of two categories of activities:

- ▶ Documenting the minimum requirements of the EVRS, and
- ▶ Documenting the various deployment strategies with a recommendation as to the best strategy for West Virginia.

Decisions about minimum requirements will be derived by group consensus. While the previous task dealt with defining, in detail, the best possible system for the State of West Virginia, this task steps back to look at what are the minimum requirements for achieving the State's objectives if the implementation budget cannot support procuring the ideal solution. Discussions will focus on questions such as:

- ▶ Which event types offer the greatest benefit to the state in the long run if you could not afford to purchase all the modules?
- ▶ Which event type provides the greatest benefit in the short run, thereby increasing the likelihood that the State can fund the implementation of subsequent modules?
- ▶ Which, if any, modules have to be implemented regardless of which event type is determined to produce the greatest advantage to the State? Modules might include issuance, amendments, corrections, extracts, inventory or accounting to mention a few.
- ▶ Which modules are required to meet current or upcoming legislative or federal requirements?
- ▶ Which modules have the greatest stakeholder support?

- ▶ Does another state system, such as imaging, have to be integrated with EVRS or can an interface work to reduce cost?
- ▶ Can some of the hardware costs be shifted to later in the project?

These and other questions will help the State to agree on implementation strategies for various levels of funding. The decisions here may also create thresholds that systems must meet in order to even be considered as viable solution.

The deliverable for this task will document the methodology used, the decisions reached and the rationale for each decision reached regarding the minimum requirements and state-wide deployment strategies. Specific topics will include:

- ▶ Minimum Requirements by event
- ▶ Minimum Technology Requirements
- ▶ Order of priority for implementing event types;
- ▶ Minimum requirements for system integration and interfaces;
- ▶ Minimum requirements for enabling technologies;
- ▶ High level data migration decisions;
- ▶ Decisions about the initial (pilot) sites to be implemented;
- ▶ Decisions relating to the timing of rolling out the event types to various stakeholder groups statewide;
- ▶ Decisions about the method of rolling out the event types to various stakeholder groups statewide.

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**Section 4, Subsection 4.5:**

**4.5. Cost/Benefit Analysis -** The cost/benefit analysis should yield the information for an estimated budget for each part of the Phase II project and the associated benefits for implementing a new EVRS and include one-time costs, such as software acquisition, implementation assistance, training costs, data conversion costs, initial system modification costs, and hardware acquisition or improvement, and recurring costs such as re-licensing fees, software maintenance fees, and other support agreements. Vendor proposal should demonstrate an understanding of cost/benefit analysis in relation to this project and provide a detailed plan of how the following deliverables for this goal could be met:

- 4.5.1. Development of cost estimates based on information from current software vendors supplying or who have supplied similar COTS systems in other states, information from other states, estimates of the numbers of stakeholders, internet research, and the Vendor's knowledge from working with other states.
- 4.5.2. Qualitative and quantitative assessments for the benefits of implementation of EVRS modules.
  - 4.5.2.1. Excel spreadsheets grouping costs by categories including:
    - 4.5.2.1.1. EVRS application costs including:
      - 4.5.2.1.1.1. EVRS Application Module Costs
      - 4.5.2.1.1.2. Vendor Scope of Services
      - 4.5.2.1.1.3. Annual Maintenance Fees
    - 4.5.2.1.2. Hardware and software costs including:
      - 4.5.2.1.2.1. Production, testing and staging environments
      - 4.5.2.1.2.2. Peripheral equipment
      - 4.5.2.1.2.3. Backup and recovery operations
    - 4.5.2.1.3. Implementation costs including:
      - 4.5.2.1.3.1. Project management costs
      - 4.5.2.1.3.2. Training costs
      - 4.5.2.1.3.3. Statewide rollout costs

***Vendor Response:***

## 4.5 Cost/Benefit Analysis

QuantumMark will provide the services and deliverables listed in Section 4, Subsection 4.5.

### *What Does the Deliverable Provide?*

The Cost/Benefit Analysis Deliverable provides the information regarding the acquisition and ongoing maintenance costs associated with implementing an EVRS and the corresponding benefits. Further, it provides a high level Project budget for fiscal planning purposes.

### *Why Is This Important?*

This deliverable is essential to allocating financial resources appropriately to ensure success over the full length of the project. It is important when evaluating the cost proposals from vendors to understand the percentage of the budget that is available for software acquisition. The Cost/Benefit Analysis Deliverable is very useful for communicating the resource requirements of the project to State management.

### *How Do We Do It?*

This task will document the Cost and Benefits of procuring a COTS application.

The cost estimates will include categories for one-time and recurring costs. Examples of one-time costs that will be reviewed include:

- ▶ Software acquisition costs;
- ▶ Implementation assistance costs;
- ▶ Training costs;
- ▶ Costs for conversion of existing data into the new system;
- ▶ Development or system modification costs;
- ▶ Hardware acquisition or upgrade costs; or,
- ▶ Costs for the procurement of system software.



Examples of recurring costs that will be considered include:

- ▶ Re-licensing fees;
- ▶ EVRS application software maintenance agreements; and,
- ▶ Hardware or software maintenance charges.

All costs will be footnoted to identify the underlying assumptions, the source and the date of the information.

Benefits will be stated by the group affected. Examples include:

- ▶ Clients;
- ▶ The Agency;
- ▶ Other State Agencies;
- ▶ Local Agencies;
- ▶ Agency vendors

Categories of cost will include:

- ▶ EVRS application pricing information for the following categories:
  - Base module pricing for each vital records module available from the vendor;
  - Typical charges for services related to a contract; and,
  - Annual maintenance fees.
- ▶ Hardware and software costs for:
  - The production, testing and training environments;
  - Peripheral equipment such as PCs, printers, scanners or bar code readers, if needed, to facilitate the new environment; and,

- Requirements to fulfill the State's needs for backup and recovery.
- ▶ Implementation and rollout costs based on discussions with the Agency regarding the approach to phasing the project and rolling the EVRS out statewide. Rollout costs will mirror the agreed upon implementation strategy.
- ▶ Travel either by state staff or by stakeholders during the development and testing of the EVRS to ensure that sufficient input has been received to ensure that the EVRS will work effectively for all user types.

The cost estimates will be derived from a variety of sources. These sources will include:

- ▶ Information obtained from Vital Records Software vendors;
- ▶ Information from vendors of peripheral equipment;
- ▶ Information obtained from other states who have engaged in a similar project;
- ▶ Estimates from the State of the numbers of stakeholders by category and volume of certificates by category;
- ▶ The State of West Virginia travel policy;
- ▶ MapQuest mileage calculator and airline reservation sites;
- ▶ Internet research; and,
- ▶ QuantumMark's experience with prior projects of similar scope and magnitude.

The cost information will be compiled in a variety of Excel spreadsheets. Grouping costs together by category and capturing them in Excel will facilitate the updating of costs by the State as the project progresses through Phase II. Basic assumptions will be documented for each cost category.

Throughout the course of Phase I activities QuantumMark will maintain a list of potential areas of improvement and benefit to be achieved with the deployment of the

EVRS. QuantumMark will work with State staff to determine to what degree each benefit can be quantified. Data will be collected for those that can be quantified and estimates will be created.

Quantifiable benefits for an EVRS typically fall into 5 categories:

- ▶ Increase in revenue
- ▶ Decrease in costs
- ▶ Reduction in turn time
- ▶ Increase in productivity
- ▶ Cost avoidance

Some examples of quantitative benefits found in other EVRS implementations include:

- ▶ Increases in State revenue resulting from the increases in fees received by the State for on line verification of social security numbers
- ▶ Cost avoidance resulting from cancelling projects to internally develop enhancement to the existing EVRS.
- ▶ Decreases in costs associated with maintaining the legacy hardware and software or eliminating the need for the current systems.
- ▶ Reduction in backlogs for registering death records.
- ▶ Improving employee productivity by eliminating manual steps.

In a similar fashion, qualitative benefits will be identified and documented. Examples of qualitative benefits include such things as:

- ▶ Ensuring uninterrupted service to the public by increasing compatibility with modern technology and sharing backup strategies/expense with other Division of Public Health systems;
- ▶ Decreasing the time from an event to the time that certified copies can be printed; and,
- ▶ Increasing quality by editing data at the source.

While benefits to the state are important to justify the cost of the project, documenting benefits that accrue to the other stakeholder participants is also a critical success factor in garnering widespread support for the project.

The resulting deliverable will be a narrative description of the methodology used to complete the task activities and a summary of the outcomes of the cost/benefit analysis. The narrative will be accompanied by supporting spreadsheets.

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**Section 4, Subsection 4.6:**

**4.6. Creation of an Implementation Plan and Schedule** - The purpose of this goal and resulting deliverables is to define the major tasks, Phase II Vendor deliverables, supporting activities, timeframes, dependencies, and resources required to implement the various EVRS modules. The schedule should be at a level that provides a clear roadmap for implementation and can support an estimate of resource and budget requirements. It is anticipated that the initial implementation plan and schedule will not be a final document but must be adjusted once a Phase II Vendor is selected. Vendor proposal should demonstrate an understanding of implementation plans, project scheduling and provide a detailed plan of how the following deliverables for this goal could be met:

**4.6.1. Facilitation of discussions surrounding the following topics:**

**4.6.1.1. The degree to which state resources are available to participate in the installation, configuration and rollout of the various modules of the EVRS system;**

**4.6.1.2. Data conversion objectives and the best approaches;**

**4.6.1.3. How quickly rollout should occur;**

**4.6.1.4. The desired approach to phased implementation;**

**4.6.1.5. Stakeholder communication requirements;**

**4.6.1.6. Training approaches, both for staff and stakeholders;**

**4.6.1.7. Deployment of the EVRS system modules to the hospitals, funeral homes, and other stakeholders;**

**4.6.1.8. How quickly all the interfaces should be up and running; and,**

**4.6.1.9. Expectations for on-going maintenance and support of the EVRS system.**

**4.6.2. Creation of the implementation schedule and implementation plan building on other project development plan activities and the discussions as noted in 4.6.1.**

**4.6.2.1. The implementation schedule should define the major tasks, deliverables, supporting activities, timeframes, dependencies and resources required to implement the various EVRS modules.**

**4.6.2.2. The implementation plan should be an explanatory narrative of the implementation schedule explaining the project scope, approach, implementation methodology, roles and responsibilities, and provide metrics for measuring success.**

***Vendor Response:***

**4.6 Creation of an Implementation Plan and Schedule**

QuantumMark will provide the services and deliverables listed in Section 4, Subsection 4.6.

## *What Does the Deliverable Provide?*

The Implementation Plan provides documentation for the State's desired approach to the implementation of the various EVRS modules at the State and all of the various stakeholder groups. The deliverable includes:

- ▶ The implementation strategy
- ▶ The context of implementation with regard to assumptions, constraints, and risks
- ▶ An overview of the major tasks, timelines, milestones and resources required to complete the EVRS implementation
- ▶ A comprehensive Work Breakdown Structure that will convey the magnitude of the effort necessary to achieve the desired end state for EVRS.

## *Why Is This Important?*

Ensuring common understandings and expectations among State staff and with the selected vendor at the outset of the Project is a key factor in ensuring project success. The Implementation Plan documents agreements regarding implementation phasing, roll out strategies, vendor tasks and State tasks. It sets a clear expectation regarding the timing of each phase, dates that are mandatory to meet and the resources required to meet the dates. It also lays out the assumptions and constraints that are driving the project timeframes.

Commercial Off-The-Shelf (COTS) Software solutions by their nature are standardized in approach and vendors tend to limit the amount of onsite time and involvement they have with the client implementation. The objective of the vendor is to provide software, not a full-scale implementation solution. Typically, in the case of vital records COTS solutions, the focus is only on ensuring implementation at the State. Usually prices do not include rollout to stakeholders. Yet, stakeholders are the key to success for a viable EVRS.

To oversimplify the project as just “implementing new software” would jeopardize achievement of the benefits expected. While there is certainly a significant technology component to the project, equally challenging

**The Implementation Project Schedule defines all major tasks, deliverables, supporting activities, timeframes, dependencies, and resources required to implement the agreed upon initiative. The schedule provides a clear road map for implementation and an estimate of resource and budget requirements.**

and time-consuming is establishing and executing the strategy to move existing internal and external users to the new system with the associated changes in processes, procedures, roles and responsibilities.

The development of the Implementation Plan is when these strategies and others are analyzed and the decision is made as to the best implementation approach. The deliverable describes the approach to, and a schedule for, implementing an EVRS. It is important to recognize that while this schedule provides a good roadmap, it will be necessary to review the vendor’s project plan prior to beginning the project in order to incorporate the nuances of their development methodology into the final integrated project plan.

However, by preparing the roadmap at this stage of the project it is easier to build consensus around how the State will allocate their resources to the project and the timeframes that are reasonable for each milestone. This information is valuable to communicate to the vendors who will propose on the project since it tells them the pace at which they need to deploy their resources.

### *How Do We Do It?*

QuantumMark will begin by working with the State to determine the best strategy and approach for implementing an EVRS. In our experience it is important to understand the State’s preferences for:

- ▶ Degree to which State resources are available to participate in the installation, configuration and rollout of the EVRS system;
- ▶ Data conversion objectives and desired approach;
- ▶ How quickly rollout should occur;
- ▶ Implementation approach;

- ▶ Stakeholder communication requirements;
- ▶ Training approaches – outsourced training, computer based training, classroom training, e-learning and train-the-trainer approaches will be discussed;
- ▶ Deployment of the EVRS system to the hospitals, funeral homes, medical certifiers, LHD and other stakeholders;
- ▶ How quickly all the interfaces should be up and running; and,
- ▶ Expectation for on-going maintenance and support of the EVRS system.

QuantumMark will facilitate discussions with the State around these topics. During these discussions QuantumMark will offer recommendations, alternatives and suggestions based on best practices and lessons learned from other vital records implementations. The outcome of the discussions will be a strategy for rolling out the EVRS to the stakeholder groups statewide for each event type, and a high level calendar that includes all the major milestones.

QuantumMark will develop an Implementation Work Breakdown Structure and Schedule in MS Project that will provide a comprehensive view of all the tasks required of both the EVRS vendor and State to successfully develop and deploy the EVRS implementation. The MS Project Schedule will define the major tasks, deliverables, supporting activities, timeframes, dependencies, and resources required to implement the agreed upon initiative. The schedule provides a clear road map for implementation and an estimate of resource and budget requirements.

The Implementation Plan Deliverable will provide a narrative explanation of the MS Project Schedule and will include project scope, approach, implementation methodology, roles and responsibilities, and metrics for measuring success. Risks, assumptions and constraints will be documented to support the reader's understanding of the schedule. The Project Plan and accompanying MS Project Schedule will serve as a blueprint for moving forward with the procurement and implementation of the EVRS system.



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**Section 4, Subsection 4.7:**

**4.7. Phase II EVRS Request for Proposal** - The Request for Proposal document is a summation of the final approved project requirements that will assist Phase II Vendors in submitting accurate, detailed, and timely proposals. Clear proposals will assist in selecting a Vendor to implement the second phase of the project and hold said Vendor accountable in the delivery of a functional EVRS. Vendor proposal should demonstrate an understanding of request for proposal development and provide a detailed plan of how the following deliverable for this goal could be met:

4.7.1. The RFP with Agency approved Phase II deliverables to be designed in the then current WV Department of Administration Purchasing Division format in conjunction with representatives from the Agency, Bureau and Departmental Purchasing Divisions, as well as the WV State Office of Technology, DHHR MIS, and others as necessary. The document format should follow the format of the then current state RFP template.

***Vendor Response:***

## **4.7 Phase II EVRS Request for Proposal**

QuantumMark will provide the services and deliverables listed in Section 4, Subsection 4.7.

### ***What Does the Deliverable Provide?***

The RFP document is the culmination of the work from all other project activities. The RFP will follow the State's standard template and QuantumMark will work with State purchasing and within the prescribed process to provide pertinent sections of the RFP. Examples of sections include:

- ▶ A summary of the background information collected during the assessment of the current environment including transaction volume information;
- ▶ A summary of the vision for the new environment developed at the beginning of the requirements definition task;

- ▶ The detailed matrices for all the business and technical requirements in an Excel format for easy scoring;
- ▶ A timeline from the Implementation Plan;
- ▶ A scope of work that describes the role the State will play and what is expected of the vendor for services and deliverables;
- ▶ The format for the vendor response.
- ▶ The evaluation criteria; and,
- ▶ An Evaluation Worksheet for use by the Evaluation Committee

### *Why Is This Important?*

A clear, complete and accurate RFP is essential to providing the information necessary for proposers to prepare a credible price and schedule, selecting the right vendor, and holding the successful vendor accountable to deliver the desired system and services.

### *How Do We Do It?*

QuantumMark has learned over the years, after working with many state procurement offices, that the most successful procurements are those where the business unit, the consultant and the procurement officer work as a team. Mutual respect of each other's skills and knowledge creates a synergy that results in a solid procurement for the state.

We will begin the process with a kick-off meeting between the EVRS Executive Sponsor, State Procurement and QuantumMark. The purpose of this meeting is to:

- ▶ Set project expectations among team members;
- ▶ Gain understanding of the West Virginia specific steps that must be completed for the RFP to be reviewed and approved for issuance;
- ▶ Gain understanding of any State-specific Technology or Legislative bodies that must either participate in the procurement process and/or approve the RFP and/or subsequent contract;
- ▶ Gain understanding of any relevant current system contracts that may come up for renewal during the project;

- ▶ Agree upon a procurement calendar;
- ▶ Review the standard State RFP template for software procurements to understand the nuances associated with the State process and to discuss what language is required versus which may be modified based on agency requirements; and,
- ▶ Discuss issues and concerns regarding the procurement process.

Lead time to issue an RFP can often take much longer than anticipated depending on the State structure and other critical procurements within the State. QuantumMark will start the RFP process during project initiation and work on this task throughout this phase of the project.

Sections of previous deliverables will be incorporated into the RFP document to describe the background for the project and the future vision. The previous deliverables will also provide the information necessary to draft an initial Scope of Work Statement. The scope will clearly delineate vendor responsibilities and State of West Virginia responsibilities and the deliverables for each milestone, including:

- ▶ Conducting project kick off and project initiation;
- ▶ System gap analysis;
- ▶ System design, configuration and unit testing;
- ▶ Data conversion;
- ▶ User acceptance testing;
- ▶ User training;
- ▶ Pilot;
- ▶ Production go live; and,
- ▶ System Warranty and Maintenance.

Once the Scope of Work section is complete, QuantumMark will turn its attention to developing the Cost Proposal Format and Evaluation Criteria. QuantumMark has templates that we have utilized in the past for other states vital records system procurements. These templates will be used to facilitate discussions with the

procurement team members with the objective of creating West Virginia specific documents for the cost proposal and evaluation criteria. The final approved RFP deliverable will be turned over to State Procurement for finalization and issuance.

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**Attachment B: Mandatory Specification Checklist**

*List mandatory specifications contained in Section 4, Subsection .5:*

**Section 4, Subsection 5.1:**

During the life of the contract, the Vendor shall provide monthly reports to the Agency project manager detailing project progress and expected timelines for deliverable completions. The schedule and report format will be agreed upon by Agency and Vendor during project initiation.

**Vendor Response:**

QuantumMark will provide monthly reports to the Agency project manager during the life of this contract. Reports will detail the project's progress and expected timelines for deliverable completions. QuantumMark will work with the Agency during project initiation to agree upon the format for these reports. Please see our response to Section 4, Subsection 4.1 for more information regarding status reporting.

**Section 4, Subsection 5.2:**

During the life of the contract, the Vendor shall assume all responsibility for meeting logistics, coordinating workgroup meetings, conference calls, web-teleconferences, documentation of all aspects of the project, paper and copying expenses, progress reports, and all other costs associated with the project.

**Vendor Response:**

QuantumMark will work with the Agency to coordinate meeting logistics for all workgroup meetings, conference calls, web-teleconferences. It is understood per the State's response to questions, the State will coordinate any meeting rooms needed for these meetings. QuantumMark will be responsible for costs associated with documentation of project activities.

**Section 4, Subsection 5.3:**

During the life of the contract, the Vendor shall hold recurring project meetings via web-teleconference at least every two (2) weeks. The schedule will be agreed upon by Agency and Vendor during project initiation.

**Vendor Response:**

QuantumMark agrees to hold recurring project meetings via web-teleconference every two (2) weeks for the life of this contract. We will work with the Agency to agree upon schedule and format of these meetings during project initiation. Please see Section 4, Subsection 4.1 for further information.

**Section 4, Subsection 5.4:**

During the life of the contract, the Vendor shall assume all travel related costs associated with their required travel for the all in-person Agency and Stakeholder meetings. Dates, times, and exact locations will be agreed upon by Vendor and Agency during project initiation meeting. Project initiation meeting will be held at 350 Capitol Street, Room 165, Charleston, WV 25301 within fifteen (15) working days of contract issuance. The following meetings will be required:

- 5.4.1 In-person Meeting Charleston - Project Initiation
- 5.4.2 In-person Meeting Charleston - Current Assessment
- 5.4.3 In-person Meeting Charleston - Future Visioning
- 5.4.4 In-person Meeting Charleston - Requirements
- 5.4.5 Stakeholder Meeting – Charleston
- 5.4.6 Stakeholder Meeting – Beckley
- 5.4.7 Stakeholder Meeting – Flatwoods
- 5.4.8 Stakeholder Meeting – Parkersburg
- 5.4.9 Stakeholder Meeting – Martinsburg
- 5.4.10 Stakeholder Meeting – Wheeling

5.4.11 In-Person Meeting Charleston – Phase II RFP Evaluation Meeting

*Vendor Response:*

QuantumMark will be responsible for our travel costs associated with the required in-person travel listed above, including the Project Initiation meeting to be held in Charleston within 15 working days of contract issuance.

**Section 5, Subsection 5.5:**

As part of their Technical Proposal, the Vendor shall provide a draft Work Plan for the proposed project with milestones noted in order to meet the requirements of the RFP. The final Work Plan shall be provided to the Agency within fifteen (15) working days following award of the Contract.

*Vendor Response:*

A draft Work Plan is included with the QuantumMark Technical Proposal (See Appendix E). The final Work Plan will be provided to the Agency within 15 working days following the award of Contract.

**Section 5, Subsection 5.6:**

The Vendor must acknowledge in writing that it understands that successful award of the contract under this Request for Proposal automatically excludes the Vendor from submitting a formal proposal in response to the Request for Proposal for Phase II that will be created as a deliverable as part of the services in this Request for Proposal.

*Vendor Response:*

QuantumMark acknowledges that award of Phase I contract under this RFP excludes QuantumMark from submitting a formal proposal in response to the RFP for Phase II created as part of the Phase I contract.

**Section 5, Subsection 5.7:**

The Vendor shall provide advisory assistance in evaluation of Requests for Proposals received from potential Vendors for Phase II of the re-engineering project, provided:

5.7.1 Phase I Vendor will not be a voting member of the evaluation team but will serve solely as advisors who are subject matter experts, knowledgeable in the area of discussion, and

5.7.2 To ensure that there is no conflict of interest, the Phase I Vendor evaluators and/or advisor(s) are required by the Purchasing Division to sign a Certification of Non-Conflict of Interest, in accordance with the [West Virginia Code §5A-3-31 -](http://www.wvlegis.state.wv.us/WVCode/ChapterEntire.cfm?chap=05a&art=3&section=31)

<http://www.wvlegis.state.wv.us/WVCode/ChapterEntire.cfm?chap=05a&art=3&section=31>.

**Vendor Response:**

QuantumMark will provide the services listed in Section 5, Subsection 5.7.

QuantumMark will provide technical assistance during the procurement process. QuantumMark has worked with other states in an advisory capacity and clearly understands the role of the State Evaluation Committee and how to support this group without influencing the outcome. QuantumMark is vendor-neutral yet has a breadth and depth of knowledge of the vital records arena that no other consulting group can claim. The testament to the neutrality of the process is the fact that various major vital records vendors have been awarded contracts after responding to an RFPs we produced.

QuantumMark will work with the State Procurement Officer, the Vital Records Project Executive Sponsor and other State designees as appropriate to coordinate and participate in, procurement activities. Assistance will include:

- ▶ Preparing for and participating, in an advisory capacity, in pre-bid teleconference(s) with vendors;
- ▶ Assisting the state in preparing answers to vendor questions;
- ▶ Training the Evaluation Committee members on how to effectively utilize the evaluation criteria and worksheets in reviewing and scoring the proposals;
- ▶ Participating in the proposal review process in an advisory, non-voting capacity.
- ▶ Organizing vendor demonstrations including;



- Arranging and coordinating the demonstrations with Procurement; and,
  - Working with the State Evaluation Committee to develop an agenda for the demonstrations in order to ensure an “apples to apples” comparison of each solution.
- 
- ▶ Participating in procurement meetings; and,
  - ▶ Assisting the State in preparing the vendor contract by answering questions and offering suggestions related to areas where the successful vendor’s proposal differs from the RFP.

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 exceeds 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: QuantumMark, LLC

Authorized Signature: Miane Durhan Date: 2-14-17

State of NEVADA

County of WASHOE, to-wit:

Taken, subscribed, and sworn to before me this 14<sup>th</sup> day of FEBRUARY, 2017.

My Commission expires 2-26-2020, 20  .

**AFFIX SEAL HERE**



**NOTARY PUBLIC**

Sandi Magee  
*Purchasing Affidavit (Revised 08/01/2015)*

**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.

Diane Borhani, Managing Partner  
(Name, Title)  
Diane Borhani, Managing Partner  
(Printed Name and Title)  
639 Isbell Rd., Ste 350, Reno, NV 89509  
(Address)  
775-853-4666                      775-853-4668  
(Phone Number) / (Fax Number)  
diane@quantummark.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.

QuantumMark, LLC  
(Company)  
Diane Borhani, Managing Partner  
(Authorized Signature) (Representative Name, Title)  
Diane Borhani, Managing Partner  
(Printed Name and Title of Authorized Representative)  
03/03/2017  
(Date)  
775-853-4666                      775-853-4668  
(Phone Number) (Fax Number)

**ADDENDUM ACKNOWLEDGEMENT FORM**  
**SOLICITATION NO.: CRFP 0506 EHP170000001**

**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 checked="" 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.

QuantumMark, LLC  
Company

Neeraj Beshani  
Authorized Signature

03/03/2017  
Date

**NOTE:** This addendum acknowledgement should be submitted with the bid to expedite document processing.

# State of West Virginia

## 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: QuantumMark LLC Signed: Aimee Beshari  
Date: 03/03/2017 Title: Managing Partner

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



NWBOC



WWW.NWBOC.ORG

RWBE16695

CERTIFICATION NUMBER

10/14/17

EXPIRATION DATE

Certifies that:

**QuantumMark, LLC**

has successfully met the requirements of the NWBOC national certification program for certification as a woman-owned and woman-controlled business.

The identified business has qualified as an eligible Woman Business Enterprise (WBE) as set forth in NWBOC standards and procedures.

**PHYLLIS HILL SLATER**  
Board Chair, NWBOC

541611, 541618, 611430, 541512, 541614

NAICS Code(s)

10/15/16

Date

WWW.NWBOC.ORG

INFO@NWBOC.ORG | 800-794-6140 | 4521 PGA Blvd., #342, Palm Beach Gardens, Florida 33418

TAMPERING OR ALTERING THIS CERTIFICATE IS, IN THE DISCRETION OF NWBOC, GROUNDS FOR TERMINATION OF CERTIFICATION.

**REQUEST FOR PROPOSAL**  
WV Department of Health and Human Resources  
Bureau for Public Health  
EHP1700000001

By signing below, I certify that I have reviewed this Request for Proposal in its entirety; understand the requirements, terms and conditions, and other information contained herein; that I am submitting this proposal for review and consideration; that I am authorized by the bidder to execute this bid or any documents related thereto on bidder's behalf; that I am authorized to bind the bidder in a contractual relationship; and that, to the best of my knowledge, the bidder has properly registered with any State agency that may require registration.

QuantumMark, LLC  
(Company)

Jean Berheini, Managing Partner  
(Representative Name, Title)

775-853-4666 775-853-4668  
(Contact Phone/Fax Number)

03/03/2017  
(Date)



## Appendix D – Staff Resumes

### Diane Borhani, MBA, CMC<sup>®</sup>

Ms. Borhani is Managing Partner and Co-Founder of QuantumMark, LLC. She is a certified management consultant with over twenty-five years of experience in a variety of private and public sector industries. Ms. Borhani has significant experience in managing large-scale, multi-location projects. She possesses a strong background in project management, business process reengineering, team development and client facilitated approaches to strategic planning, process improvement, redesign and functional requirements definition. Her areas of expertise include project design and management, change management, leadership consulting, and training. Ms. Borhani is also skilled in TQM (total quality management) facilitating groups and doing organizational development (OD), organizational change management and Kaizen which were predecessors to the LEAN Management System. Much of her expertise has been garnered through numerous vital records projects. Ms. Borhani has Masters Degrees in International Management and Business Administration and has been certified by the IMC USA. For additional information please request a copy of her comprehensive CV.

Ms. Borhani serves as Engagement Director for QuantumMark projects and provides oversight and quality assurance for project deliverables.

#### EXPERIENCE

- Pennsylvania Department of Health, Office of Vital Records 2/2017 – Present
- Nevada Department of Taxation, Recreational Marijuana Facilitation 1/2017 – Present
- Dept. of Health, State of Arkansas, Center for Health Statistics, Vital Records 12/2016 – Present
- District of Columbia, Vital Records 10/2016 – Present
- Nevada Department of Public and Behavioral Health, WIC 9/2016 – Present
- Indiana State Dept. of Health, Vital Records 3/2016 – Present
- Dept. of Health and Environmental Control, State of South Carolina, Public Health Statistics and Information Services, Vital Records 10/2015 – Present
- Dept. of Health and Social Services, State of Alaska, Bureau of Vital Statistics, office of Vital Records 10/2009 – 6/2015
- Dept. of Health, State of Arkansas, Child and Adolescent Health 3/2008 – 6/2014
- Dept. of Health, State of Arkansas, Center for Health Statistics 6/2013 – 12/2013
- Dept. of Health, State of Arkansas, Center for Health Statistics 1/2013 – 2/2013
- DHHS, State of North Carolina, State Center for Health Statistics 10/2012 – 3/2013
- Department of Health, Commonwealth of Pennsylvania, Bureau of Health Statistics & Research 9/2012 – 1/2013
- Department of Health, Commonwealth of Pennsylvania, Bureau of Health Statistics & Research 2/2010 – 6/2010
- Dept. of Health, State of Arkansas, Center for Health Statistics 1/2008 – 3/2010
- Dept. of Health and Human Services, State of Nevada, Health Division 6/2008 – 2/2009
- Dept. of Health, State of Tennessee, Office of Policy, Planning and Assessment 2/2008 – 2/2009
- Dept. of Human Services, State of Oregon, Center for Health Statistics and Office of Information Services 1/2008 – 6/2008
- Health Division, State of Nevada, Bureau of Health Planning and Statistics 11/2004 – 3/2008
- Dept. of Health, State of Arkansas, Center for Health Statistics 12/2006 – 1/2008

- Health Division, State of Nevada, Bureau of Health Planning and Statistics 6/2004 – 6/2004
- Dept. of Human Services, State of Oregon, Center for Health Statistics 11/2003 – 4/2004
- Health Division, State of Nevada, Bureau of Health Planning and Statistics 9/2001 – 4/2002
- State of Nevada, Department of Health and Human Services, Division of Public and Behavioral Health 1/2014 – 6/2014
- State of Nevada, Department of Health and Human Services, Division of Public and Behavioral Health 9/2013 – 12/2013
- Health Division, State of Nevada, Bureau of Health Care, Quality & Compliance 5/2013 – 6/2013
- Health Division, State of Nevada, Substance Abuse Prevention & Treatment Agency 4/2013 – 12/2013
- Health Division, State of Nevada, State Health Officer 4/2011 – 12/2013
- National Cancer Institute (NCI), Small Business Innovative Research Program 4/2011 – 6/2011
- Health Division, State of Nevada, Central Cancer Registry 10/2007 – 10/2007
- University of Nevada, Las Vegas, NV, Center for Health Information Analysis 8/2005 – 10/2005
- Health Division, State of Nevada, Central Cancer Registry 1/2004 – 6/2004
- Health Division, State of Nevada, Central Cancer Registry 4/2003 – 1/2004
- Redundant Network, NV 11/2002 – 1/2003
- Health Division, State of Nevada, Central Cancer Registry 3/2002 – 9/2002
- Harley-Davidson Financial Services, Inc., NV 4/2002 – 6/2002
- Dept. of Alcohol and Drug Programs, State of California 10/2001 – 10/2002
- Dept. of Wildlife, State of Nevada 12/2000 – 8/2001
- Dept. of Motor Vehicles, State of Nevada 1/1995 – 3/2000
- LandAmerica Financial Group, Inc., Richmond, VA 5/1998 – 8/1999
- LandAmerica Financial Group, Inc., Richmond, VA 8/1997 – 2/1998
- LandAmerica Financial Group, Inc., Richmond, VA 10/1997 – 12/1997
- Derwent Publications, LTD, London, England 6/1992 – 5/1995
- Boyd Gaming Corporation, Las Vegas, NV 7/1995 – 11/1995
- Comstock Hotel and Casino, Las Vegas, NV 11/1994 – 1/1995
- Dept. of Personnel, State of Nevada 1/1994 – 7/1994
- J. B. Hunt Transportation, Fayetteville, AR 1/1990 – 5/1990
- HYTASA, S. A. (govt. wool & cotton textiles factory), Seville, Spain 6/1988 – 12/1989
- A.F.O.R.A., S. A. (Steel Mill), Northern Spain 4/1989 – 12/1989

## EXPERTISE

- Project Management
- Implementation Planning and Oversight
- Development of Project Plans, Schedules and Timelines and Resource Assessment
- System Requirements Definition
- Communication Plans and Processes
- Cost and Budget Planning and Management
- Facilitation of internal and external stakeholders
- User Acceptance Testing, Pilot and Go-Live Development and Oversight
- Benchmarking electronic systems across a wide range of states, vendors, applications
- Reengineering and Process Improvement
- Needs Assessments
- Development of program processes and procedures
- Providing briefing and support for executive and legislative branches
- Project Oversight
- Experience with NAPHSIS Use Case Models
- Current Environment Assessment and Future Environment Visioning
- RFP Development
- Vendor Evaluation and Oversight
- Project Mentoring and Succession Planning
- Stakeholder Rollout Plans
- Strategic Planning
- Development and facilitation of training materials
- Delivering training to internal and external stakeholders
- Organizational Design and Improvement
- Capacity Planning

**Education:**

University of California, Davis, CA - Dual BA, International Relations/Spanish  
The American Graduate School of International Management - MIM, Masters in  
International Management  
Escuela Superior De Administracion Y Direccion De Empresas (ESADE) - MBA

**Certifications:**

*Certified Management Consultant (CMC®), IMC USA.*  
*Certified Professional Consultant to Management (CPCM), National Bureau of  
Management Consultants*

**Suzanne March, MBA, CMC<sup>®</sup>**

Ms. March is Partner and Co-Founder of QuantumMark, LLC. Prior to her work as a consultant, Ms. March was an entrepreneur and information technology professional with more than twenty years of experience in positions as business owner, Vice President, General Manager, Software Development Director, Project Manager, software designer, systems analyst/programmer and instructor. Since 1990, in her work as a consultant, her areas of expertise include project planning, project management, facilitation, needs assessment, process improvement and process redesign, requirements definition, cost/benefit analysis, RFP development, software vendor selection and software vendor oversight. Ms. March is also skilled in TQM (total quality management) facilitating groups and doing organizational development (OD), organizational change management and Kaizen which were predecessors to the LEAN Management System. Ms. March's experience includes a wide range of public and private sector clients and projects. She is a member of the Beta Gamma Sigma and Phi Kappa Phi national honor societies and has been certified by the IMC USA. The following is a brief listing of the expertise Ms. March has accumulate over multiple years and multiple projects. For additional information please request a copy of her comprehensive CV.

**EXPERIENCE**

- Department of Health and Environmental Control, State of South Carolina, Public Health Statistics and Information Services, Vital Records 11/2014 – Present
- Indiana State Department of Health, Vital Records 12/2014 – Present
- National Association for Public Health Statistics and Information Systems 8/2012 – 1/2013
- DHHS, State of North Carolina, State Center for Health Statistics 10/2012 – 3/2013
- Department of Health, Commonwealth of Pennsylvania, Bureau of Health Statistics & Research 9/2012 – 1/2013
- Department of Health, Commonwealth of Pennsylvania, Bureau of Health Statistics & Research 2/2010 – 6/2010
- Dept. of Health and Social Services, State of Alaska, Bureau of Vital Statistics 10/2009 – 1/2011
- Dept. of Health, State of Tennessee, Office of Policy, Planning and Assessment 2/2008 – 2/2009
- Dept. of Human Services, State of Oregon, Center for Health Statistics and Office of Information Services 12/2006 – 1/2008
- Dept. of Health, State of Arkansas, Center for Health Statistics, Vital Records 1/2008 – 3/2010
- Health Division, State of Nevada, Bureau of Health Statistics and Planning 11/2004 – 12/2007
- Health Division, State of Nevada, Bureau of Health Statistics and Planning 6/2004 – 7/2004
- Dept. of Human Services, State of Oregon, Center for Health Statistics 11/2003 – 4/2004
- Health Division, State of Nevada, Bureau of Health Statistics and Planning 3/2002 – 10/2002
- Health Division, State of Nevada, Bureau of Health Statistics and Planning 9/2001 – 4/2002
- Nevada Department of Public and Behavioral Health, WIC 9/2016 – Present
- Health Division, State of Nevada, Bureau of Health Care, Quality & Compliance 5/2013 – 6/2013
- Health Division, State of Nevada, Substance Abuse Prevention & Treatment Agency 3/2013 – 4/2013
- Health Division, State of Nevada, State Health Officer 4/2011 – 6/2011
- National Cancer Institute (NCI), Small Business Innovative Research Program 10/2007 – 6/2012
- Health Division, State of Nevada, Central Cancer Registry 11/2005 – 6/2007

• <u>Health Division, State of Nevada, Immunization Registry Program (WebIZ)</u>	9/2006 – 2/2007
• <u>Dept. of Wildlife, State of Nevada</u>	8/2002 – 10/2005
• <u>Health Division, State of Nevada, Nevada Central Cancer Registry</u>	1/2004 – 6/2004
• <u>Health Division, State of Nevada, Nevada Central Cancer Registry</u>	4/2003 – 1/2004
• <u>Harley-Davidson Financial Services, Inc., NV</u>	4/2002 – 6/2002
• <u>Dept. of Alcohol and Drug Programs, State of California</u>	10/2001 – 11/2001
• <u>Dept. of Wildlife, State of Nevada</u>	12/2000 – 8/2001
• <u>Dept. of Motor Vehicles, State of Nevada</u>	11/1995 – 3/2000
• <u>LandAmerica Financial Group, Inc., Richmond, VA</u>	9/1997 – 3/1999
• <u>Derwent Information, Alexandria, VA</u>	8/1996 – 2/1997
• <u>City of Buena Park, CA</u>	2/1995 – 5/1996
• <u>Boyd Gaming Corporation, Las Vegas, NV</u>	7/1995 – 11/1995
• <u>University of Nevada, Reno, Foundation, NV</u>	3/1995 – 4/1995
• <u>Dept. of Transportation, State of Nevada</u>	8/1994 – 2/1995
• <u>Derwent Information, London, England</u>	6/1994 – 8/1994
• <u>Dept. of Wildlife, State of Nevada</u>	2/1992 – 3/1994

#### EXPERTISE:

- Project Management
- Implementation Planning and Oversight
- System Requirements Definition
- Information Technology Evaluation and Audit
- Communication Plans and Processes
- Cost and Budget Planning and Management
- Facilitation of internal and external stakeholders
- User Acceptance Testing, Pilot and Go-Live Development and Oversight
- Providing briefing and support for executive and legislative branches
- Benchmarking electronic systems across a wide range of states, vendors, applications
- Reengineering and Process Improvement
- Needs Assessments
- Strategic Planning
- Project Oversight
- Experience with NAPHSIS Use Case Models
- Current Environment Assessment and Future Environment Visioning
- RFP Development
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- Project Mentoring and Succession Planning
- Stakeholder Rollout Plans
- Development of training materials
- Delivering training to internal and external stakeholders
- Development of program processes and procedures
- Organizational Design and Improvement
- Capacity Planning
- Evaluation processes and procedures

#### Education:

University of Nevada, Reno, NV - MBA, Management  
Michigan State University, MI - BA, Honors College, Economics

#### Certifications:

*Certified Management Consultant (CMC®), IMC USA.*  
*Certified Professional Consultant to Management (CPCM), National Bureau of Management Consultants*

## Petra Borhani-Bakker

### Profile:

Ms. Borhani-Bakker is a professional and skilled consultant. She provides effective leadership to every engagement. Her background across several industries has given her a true out-of-the-box perspective that takes projects to new heights. She has proven herself to be a critical thinker for project details and task execution. Petra engages well with clients at all levels and she excels in facilitating groups to achieve common goals. Areas of expertise include project management, facilitation, strategic planning, technical writing, communication and project oversight.

### Industries:

Vital Records, Public Health, Marketing, Design, Government

### Professional Experience:

#### QuantumMark, LLC, Reno, NV

12/2016 – present

*Project Lead, Arkansas Quality of Death Reporting Project*

- Conduct the project initiation tasks (interviews, kickoff, project planning)
- Prepare the Kick-off Summary Report
- Prepare the Project Plan
- Manage the project schedule
- Manage the accomplishment of the strategies and participate directly in removing barriers to both internal and external performance
- Prepare Monthly Status Reports
- Prepare Final Report
- Mentor State team members to transition responsibility for ongoing timeliness and quality initiatives at the end of the project

#### QuantumMark, LLC, Reno, NV

10/2016 – present

*Project Lead, Washington, DC EDRS Project*

- Conduct the project initiation tasks (interviews, kickoff, project planning)
- Prepare the Kick-off Summary Report
- Prepare the Project Plan
- Manage the project schedule
- Identify barriers to success and assist team to remove barriers to both internal and external performance
- Actively participate in analysis of the current EDR environment, preparation of the vision for the new environment, identification of gaps in the vendor product and definition of requirements to correct the gap
- Work with D.C. team to improve the Query process
- Prepare Monthly Status Reports



- Prepare Final Report
- Mentor State team members to transition responsibility for ongoing timeliness and quality initiatives at the end of the project

## **QuantumMark, LLC, Reno, NV**

**9/2011 – present**

*Consultant, Business Analyst and Social Media Manager*

- Increase of firm's online visibility through social media strategy.
- Coordinate events, press releases, social media and blog posts, as well as website upkeep.
- Partnered with subcontractor to redesign website using Photoshop.
- Developed a system for easy evaluation of project profitability through Excel spreadsheets; created preliminary spreadsheets for year-end accounting; assisted with development of profit/loss statement and balance sheets.
- Coordinated firm's relocation to new office site in 2012.

## **Marketing Specialist**

**5/2013 - Present**

The Sharp Team at Coldwell Banker, Truckee, CA

- Responsible for design and implementation of campaigns to capture client leads through mailings, eBlasts, and other online tools; manage client data base.
- Assisted with design of new website in order to better capture online inquiries; responsible for website maintenance, social media strategy and implementation.
- Coordinate with Coldwell Banker Luxury Division on marketing strategies to optimize exposure for exceptionally noteworthy and high end listings.
- Source and stage client homes in to expedite sales of listings.

## **Design Assistant**

**5/2012 – 5/2013**

Catherine Macfee Interior Design, Truckee, CA

- Managed office communication, scheduled office supply orders and vendor meetings; organization of materials library.
- Created finish, plumbing, and lighting schedules; created proposals for client approval; reserved materials accordingly.
- Responsible for project organization, including proposals, budgets, and ordering approved items for project implementation.
- Assisted Principal Designer with on-site meetings and preparation, site measurements, and finishing selections.
- Helped with staging installations.
- Coordinated staging of Martis Camp residence and subsequent photo shoot published in December 2012 issue of California Homes.
- Coordinated Pottery Barn photo shoot in Martis Camp residence - Winter 2013.
- Prepared project invoicing monthly for review by Principal Designer.



**Design Intern**

**Spring 2012**

Richard Todd Design LTD, Reno, NV

- Assisted Principal Designer with researching products and materials.
- Provided ideas, feedback, and sketches for client projects.
- Researched cost-effective materials for tightly budgeted apartment manor renovations.
- Note taking during client meetings.

**Office Assistant**

**1/2008 – 5/2011**

Syracuse University, Office of Student Affairs, Syracuse, NY

- Facilitated information distribution internally at the University and externally to interested parties.
- Organized and updated student files.
- Assisted with graphic design of flyers, convocation book and other University printed materials.

## Beckey Ganschow

### Profile:

Ms. Ganschow is an experienced, results-oriented, and trusted consultant. She has a proven ability to engage with a wide variety of audiences. Her strengths include learning new subjects and then being able to communicate those topics to others in a gentle and easy manner. Beckey's technical knowledge and experience enables her to provide training and project management activities that achieve project goals. Since she is comfortable with public speaking, she has the ability to facilitate groups to reach a common objective. Beckey is currently providing her expertise to several projects for rollout of new vital records systems to a broad range of stakeholder groups.

### Industries:

- Public Health, Vital Records, Education, Healthcare, Medical Marijuana Programs, Government

### Professional Experience:

#### QuantumMark, LLC, Reno, NV

2/2016 – Present

**Consultant, Commonwealth of Pennsylvania** – Responsible for coordinating live webinar training to all Funeral Homes, Coroner and Medical Examiners and providing Help Desk support.

- Participate in Train-the-Trainer session in Harrisburg
- Provide Live Webinar training for Funeral Homes and Coroners/MEs.
- Provide training session and instructor evaluation forms
- Provide session attendance information
- Assist the Help Desk Support personnel in addressing end user questions related to the training materials
- Assist the Help Desk Support personnel in providing technical assistance to end users having trouble using EDRS
- Contact end users not in compliance to identify and resolve issues
- Provide updates to the EDRS User Problem/Issue Tracking System

#### QuantumMark, LLC, Reno, NV

12/2016 – Present

**Consultant, State of Arkansas** – Responsible for developing Cause of Death Training to achieve quality improvement in death reporting.

- Develop COD training specific to the Arkansas goals for quality improvement as instructor led webinars
- Create an internet accessible modularized version of the training
- Provide instructor led training via web conferencing technology for medical certifiers

- Review tracking sheets to evaluate training effectiveness and make modifications to the training as indicated
- Serve as contact for end users for any questions related to the training materials
- Work with the outreach coordinator and the State to follow back with individuals still experiencing difficulties

**QuantumMark, LLC, Reno, NV**

**10/2016 – Present**

**Consultant, Washington, DC** – Responsible for developing Cause of Death Training specific to DC, coordinating training and developing tracking sheets. Assists the DC staff and QuantumMark project lead as needed to facilitate training for targeted stakeholder groups.

- Develop COD training specific to the D.C. goals for quality improvement as instructor led webinars
- Create an internet accessible modularized version of the training
- Assist D.C. Project Sponsor in applying for CME credits
- Provide instructor led training via web conferencing technology for medical certifiers
- Review tracking sheets to evaluate training effectiveness and make modifications to the training as indicated
- Serve as contact for end users for any questions related to the training materials
- Work with the outreach coordinator and the D.C. team to follow back with individuals still experiencing difficulties

**QuantumMark, LLC, Reno, NV**

**12/2014 – 8/2016**

**Consultant, State of Arkansas** – Delivered the training for the AR ERAVE Death Certificate and CDC Cause of Death Training for all AR State funeral homes, coroners, medical examiners, hospice and medical certifiers statewide.

- Worked with State to prepare training materials.
- Developed tracking spreadsheet with all stakeholder contact info.
- Coordinates ongoing efforts to find and maintain current contact information for all State stakeholders who access death records.
- Works with internal staff to contact each facility and trainee to coordinate training times.
- Collects User Agreements and Confidentiality Forms.
- Uses information provided on Forms to create logins and passwords for the ERAVE training environment.
- Sets up GoToMeeting training and emails invitation to all participants.
- Delivers training, including oversight of hands-on trainee practice in the training environment.
- Updates spreadsheet with trainee details and tracks facility and individuals trained.
- Submits tracking spreadsheet to State project sponsor.

- Emails all training materials to trainees after the session, including user manual, quick reference guide, practice worksheets and PowerPoint slide presentation. A link to the online training recording was also provided to trainees.
- Follow up after training to conduct training sessions for no-shows.
- Follows up with trainees who are not utilizing ERAVE to understand reasons and facilitate problem resolution.
- Provides level one technical support as needed.
- Provides detailed status report to State monthly with regular update meetings bi-weekly.

### **QuantumMark, LLC, Reno, NV**

**2/2013 – Present**

**Consultant**– Provides expertise in project coordination, documentation and training for various contracts awarded to QuantumMark, in addition to internal company tasks such as creating forms, Visio flow charts and other project activities.

- Provide project coordination for QuantumMark projects.
- Host conference calls, webinars and schedule training seminars for various project participants.
- Create Visio flow charts and forms.
- Assist with design and production of marketing materials for projects, vendors and trade shows.
- Attend educational seminars and workshops to stay abreast of industry standards.
- Assist in writing, review and proofing of proposals.

### **QuantumMark, LLC, Reno, NV**

**2/2014 – 6/2014**

**Consultant, State of Arkansas** – Delivered the training for the AR ERAVE Infant Hearing module for Clinics and Primary Care Physicians

- Worked with State to prepare training materials.
- Developed tracking spreadsheet with all stakeholder contact info.
- Contacted each facility and trainee to coordinate training times.
- Collected User Agreements and Confidentiality Forms.
- Used information provided on Forms to create logins and passwords for the ERAVE training environment.
- Set up GoToMeeting training and email invitation to all participants.
- Delivered training, including hands-on trainee practice in the environment.
- Updated spreadsheet with trainee details and noted which facility and individuals were trained.
- Provided spreadsheet to State project sponsor.
- Emailed all training materials to trainees after the session, including user manual, quick reference guide, practice worksheets and PowerPoint slide presentation. A link to the online training recording was also provided to trainees.

**QuantumMark, LLC, Reno, NV**

**3/2014 – 6/2014**

**Consultant, Nevada Medical Marijuana Program (MMP)**

- Created supporting documentation for the Program.
- Conducted research into other state programs.
- Developed forms, organizational charts, Visio flows.
- Assisted with the creation of training materials for newly hired state staff.
- Created the MMP application form.

**QuantumMark, LLC, Reno, NV**

**11/2013 – 12/2013**

**Consultant, State of Arkansas** – Delivered the training for the AR ERAVE Birth Certificate Module for all AR State hospitals and midwives

- Worked with State to prepare training materials.
- Developed tracking spreadsheet with all stakeholder contact info.
- Contacted each facility and trainee to coordinate training times.
- Collected User Agreements and Confidentiality Forms.
- Used information provided on Forms to create logins and passwords for the ERAVE training environment.
- Set up GoToMeeting training and email invitation to all participants.
- Facilitated training, including hands-on trainee practice in the environment.
- Updated spreadsheet with trainee details and noted which facility and individuals were trained.
- Provided spreadsheet to state project sponsor.
- Emailed all training materials to trainees after the session, including user manual, quick reference guide, practice worksheets and PowerPoint slide presentation. A link to the online training recording was also provided to trainees.

**QuantumMark, LLC, Reno, NV**

**9/2013 – 12/2013**

**Consultant, State of Arkansas** – Delivered the training for the AR ERAVE Infant Hearing module for all AR State hospitals

- Worked with State to prepare training materials.
- Developed tracking spreadsheet with all stakeholder contact info.
- Contacted each facility and trainee to coordinate training times.
- Collected User Agreements and Confidentiality Forms.
- Used information provided on Forms to create logins and passwords for the ERAVE training environment.
- Set up GoToMeeting training and email invitation to all participants.
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- Provided spreadsheet to state project sponsor.

- Emailed all training materials to trainees after the session, including user manual, quick reference guide, practice worksheets and PowerPoint slide presentation. A link to the online training recording was also provided to trainees.

**QuantumMark, LLC, Reno, NV**

**9/2013 – 11/2013**

**Script Writer, State of Arkansas** – Facilitated the development of scripts for User Acceptance Testing (UAT) for the AR ERAVE System

- Worked with State to gain access to the ERAVE system for testing purposes.
- Reviewed system materials to gain understanding of the system capabilities.
- Developed step by step instructions for the UAT process.
- Tested script integrity prior to release for official testing.
- Created more than 100 test scripts.

**QuantumMark, LLC, Reno, NV**

**2/2013 – 12/2013**

**Webinar Facilitator, Institute of Management Consultants, USA (IMC USA) Academy for Professional Development** – Facilitated Academy operations and course presentations

- Worked with IMC USA and other consulting contacts to find and vet course instructors.
- Performed background checks on potential instructors.
- Conducted interviews with potential instructors.
- Reviewed instructor applications.
- Evaluated course materials.
- Created and oversaw contracting with instructors.
- Established annual course calendar.
- Obtained confirmation from the instructor of the date and time for training.
- Scheduled the class in a web-based program such as Citrix GoToWebinar.
- Enabled student registration and fielded calls
- Managed updates to course descriptions and calendars.
- Managed downloadable class materials and information.
- Introduced the instructor during the session and managed the Q&A at the end.
- Recorded sessions and published recordings to Academy store.
- Created and distributed promotional materials for courses.
- Monitored website and email for student questions and troubleshoot issues.
- Performed Academy accounting activities including P&L statements, instructor invoices and course tracking for profitability.

## Mary Ann Cadd

### Profile:

Ms. Cadd is a professional consultant with a long and solid foundation in healthcare. She is a detail-oriented problem solver who quickly identifies opportunities for improvement and applies common sense approaches to problem solving. Her years of professional experience and deep understanding of medical coding and best practices in physician practice management provide a natural transition into the world of vital records. She has quickly learned death processes in multiple states and is effectively providing consulting services on several vital records projects. Ms. Cadd is a Certified Professional Medical Auditor (CPMA) and a CPC-A Certified Professional Coder with ICD-10-CM certification.

### Industries:

Vital Records, Public Health, Healthcare, Private Physician Practices, Medical Coding and Billing, Substance Abuse Prevention and Treatment, Health Insurance, Government

### Professional Experience:

#### QuantumMark, LLC, Reno, NV

2/2017 – present

*Lead Consultant, Commonwealth of Pennsylvania EDRS Training Project*

- Manage trainers in webinar
- Work with Registration Specialist for Webinar Training to prioritize calls.
- Evaluate training effectiveness and recommend modifications or enhancements to DOH.

#### QuantumMark, LLC, Reno, NV

12/2016 – present

*Consultant, Arkansas Quality of Death Reporting Project*

- Assisting with project initiation tasks
- Participate in death process redesign to support CDC grant goals.
- Assess accuracy of EDRS coding and make recommendations for improvement
- Develop COD training
- Providing subject matter expertise to strategies for removing barriers to both internal and external performance
- Work with State team members to transition responsibility for ongoing timeliness and quality initiatives at the end of the project

#### QuantumMark, LLC, Reno, NV

10/2016 – present

*Consultant, Washington, DC EDRS Project*

- Assisting with project initiation tasks
- Participate in death process redesign to support CDC grant goals.
- Assess accuracy of EDRS coding and make recommendations for improvement



- Develop COD training
- Providing subject matter expertise to strategies for removing barriers to both internal and external performance
- Work with State team members to transition responsibility for ongoing timeliness and quality initiatives at the end of the project

**QuantumMark, LLC, Reno, NV**

**3/2016 – present**

*Consultant, Nevada Urban Indians*

- Provide medical coding and billing support ongoing by:
  - Reviewing medical charts and validating that coding is correct
  - Following back on questionable codes to make corrections as indicated
  - Training providers and support staff on proper documentation procedures for compliant billing
  - Submitting billing to payers
  - Posting payments

**QuantumMark, LLC, Reno, NV**

**6/2016 – 12/2016**

*Consultant, Rural Nevada Counseling*

- Mapped current processes and compare to best practices
- Audited billing files
- Produced findings and recommendations report for improvements in practice management and billing
- Worked with client to implement improvement plan
- Managed the implementation of the Electronic Health System (EHR)
- Trained billing, intake and clinical staff on new procedures for new EHR

**QuantumMark, LLC, Reno, NV**

**7/2016 – 10/2016**

*Consultant, HELP of Southern Nevada*

- Mapped current processes and compare to best practices
- Trained billing staff on best practices
- Audited billing files
- Identified additional sources of revenue for services provided but not billed
- Produced findings and recommendations report for improvements in practice management and billing

**QuantumMark, LLC, Reno, NV**

**5/2016 – 6/2016**

*Consultant, Northern Valley Indian Health, Willow CA*

- Audited 184 medical records to determine of the correct codes were used
- Prepared comprehensive findings and recommendations report including supporting worksheets
- Presented client with recommendations for improvements

**CAREER COLLEGE OF NORTHERN NEVADA, Sparks, NV**

**2/2014 – 5/2016**

*Certified Instructor, Health Information Management*

- Instructor for HIM students in various aspects of the health information management field.
- Developed curriculum and taught the following:
  - Professional and institutional health care billing in both paper and electronic medium. CMS-1500 and CMS 1450 formats.
  - Electronic Health Records (EHR) management techniques
  - Medical terminology
  - Anatomy and pathophysiology
  - Government regulations such as Health Insurance Portability and Accountability Act (HIPAA)
  - HITECH and compliance, as well as medical law and ethics
  - General medical office management
  - Quality assessment and performance improvement techniques (i.e. DMAIC, Lean Six Sigma, etc.)

**HOMETOWN HEALTH (RENOWN HEALTH SYSTEM), Reno, NV**

**2/2013 – 2/2014**

*Medicare Enrollment Assistant-Senior Care Plus*

- Provided daily customer service assistance to current and prospective members, as well as customer service department requests regarding enrollment, payment and benefit information for Senior Care Plus, a Medicare Advantage Plan.
- Reporting and tracking enrollment processes utilizing multiple Excel spreadsheets and proprietary software.

**ST. LUKE'S HEALTH SYSTEM, Boise, Idaho**

**5/2005 – 10/2010**

*September 2009 – October 2010: Clinical Research Financial Specialist (Mountain States Tumor Institute)*

- Performed a Medicare Coverage Analysis for every potential clinical trial. This included reviewing all services to verify appropriate diagnosis and procedure codes and comparing against CMS NCD's and LCD's to ensure compliant billing.
- Developed and trained clinicians on proper documentation for accurate research for CMS approved billing procedures
- Prepared clinical trial budgets for all research studies.
- Reviewed all facility charges for appropriate billing determination and added appropriate diagnosis codes and modifiers for routine services.
- Prepared billing statements for sponsor payment and developed tracking procedures to ensure proper reimbursement.
- Developed written policies and procedures and trained staff in proper coding, patient registration, billing, and medical documentation requirements for clinical trial services.
- Contacted insurance companies to verify coverage, resolve disputed and denied claims.

*June, 2006 - October, 2009: Research Biller, Research Billing Analyst (Office of Research Administration)*

- Developed all the necessary billing policies and procedures for clinical trial billing.
- Reviewed all the claims for patients enrolled in clinical trials to determine which services based on CPT and ICD codes and medical records were research vs. routine services.
- Collaborated with patient financial services to provide customer service.
- Performed insurance follow-up and filed appeals for claim denials when appropriate.

*May, 2005 - June, 2006: Insurance Credit Clerk, (St. Luke's Internal Medicine)*

- Reviewed charge tickets for appropriate diagnosis and procedure codes and entered into the claims processing system.
- Provided customer support for patients, providers and insurance companies.
- Provided claims follow-up for aged claims and filed appeals for denied claims.

**MODOC MEDICAL CENTER, Alturas, CA**

**9/2000 – 4/2004**

*Business Office Manager*

- Managed business procedures for small staff for the business office that included all day-to-day operations of a busy rural hospital.
- Prepared all written policies and procedures in accordance with established facility guidelines and trained staff.
- Trained billing and clinical staff for compliant and accurate billing of services provided.
- Prepared the quarterly Medicare Credit Reports.
- System administrator for the claims processing system.
- Primary backup for all positions including patient registration, electronic claims billing, charge and payment posting as well as customer service and collection activities.

**OLYMPIC HEALTH MANAGEMENT SERVICES, Bellingham, WA**

**1997 – 2000**

*1999 – 2000: Manager, Combined Insurance Company TPA*

- Claims manager for Combined Insurance, as a third party administrator.
- This was a newly created position and was responsible for hiring and training a staff of approximately 24 employees to include customer call center positions and claims processing positions.
- On boarded a 65,000 member supplemental insurance group plan.

*1997 – 1999: Senior Claims Analyst, Claims Manager*

- Processed all high dollar and complex level medical, dental, flexible cafeteria claims for self-funded group plans.
- Provided customer service phone support.
- As a Claims Manager, assumed management support for the claims department for self-funded group clients which included working with re-insurers, and clients on a daily basis.

## Kelly Jessee

### Profile:

Ms. Jessee is an experience professional consultant, who quickly establishes confidence in her clients. Kelly is able to grasp project details and bring them together in an easy to understand comprehensive project management plan, the key to every project's success. Her skill as a facilitator enables her to bring groups together to achieve project goals and her expertise in conducting current assessments make her a valuable part of the QuantumMark Team. Areas of strength include assessments, deliverable development, managing ongoing project activities against project schedule, status reporting and issue resolution.

### Industries:

- Public Health, Healthcare, Mental Health, Retail, Government

### Professional Experience:

#### QuantumMark, LLC, Reno, NV

*Consultant, State of Nevada, Department of Taxation*

**1/2017 – present**

Provide facilitation for the Governor's Task Force for Adult Use Marijuana.

- Project Initiation Activities including defining goals, refining project schedules, assigning roles and responsibilities, and preparing meeting agendas and other materials for work groups.
- Facilitate Work Groups and the task force by preparing agendas, facilitating discussions, and collaborating with workgroups and the task force.
- Write Final Report
- Provided Regular informal status updates with State

#### QuantumMark, LLC, Reno, NV

*Consultant, State of Nevada, Department of Health and Human Services, Division of Public and Behavioral Health*

**9/2016 – 2/2017**

Project Management and facilitation for Nevada Women, Infants and Children Program (WIC) implementation of the Mountain Plains eligibility/certification system.

- Ms. Jessee facilitates status meetings between the State, software vendor and subject matter experts regarding project progress.
- Provides monthly executive level reports to WIC project lead, coordinates issue resolution meetings, risk mitigation assessments and assists the State in managing timeline tasks and schedule.

**QuantumMark, LLC, Reno, NV**

**7/2016 – 9/2016**

*Consultant, State of Nevada, Department of Health and Human Services, Division of Public and Behavioral Health*

Through grant funds provided by the Substance Abuse Prevention and Treatment Agency (SAPTA), MS. Jessee facilitated two SAPTA provider facilities to:

- Improve processes and implement efficiencies for billing systems and procedures.
- Conducted assessments, facilitated training and developed policies and procedures manual.

**QuantumMark, LLC, Reno, NV**

**1/2016 – 9/2016**

*Consultant, State of Nevada, Department of Health and Human Services, Division of Public and Behavioral Health*

The ultimate goal of the project was to transition the program to a local entity already involved in the maternal and child arena. Ms. Jesse successfully facilitated that transition.

- Facilitate the establishment and provision of community based home visiting services to expectant families with children up to kindergarten entry in Mineral County
- Developed a project charter and execution plan for the implementation of the Parents as Teachers model
- Organized and worked weekly with the PAT Coordinator and staff throughout all project phases
- Facilitated multi-level training for PAT Staff
- Provided monthly project statuses to NDPBH and Project Sponsor
- Developed and distributed project plan documents and status reports
- Appraised impacts and ensured corrective actions were taken and lead the PAT staff to ensure that deliverables were met on time and within budget.

**QuantumMark, LLC, Reno, NV**

**1/2014 – 6/2015**

*Consultant, State of Nevada, Department of Health and Human Services, Division of Public and Behavioral Health*

Lead Facilitator for the Medical Marijuana Registration and Oversight Development Facilitation and Needs Assessment Project. Her roles included:

- Ensuring the project meets State deadlines for launching the Medical Marijuana Program
- Development of the project schedule for implementation
- Facilitation of the process of accepting and evaluating applications from prospective establishments.
- Development of the processes and procedures for the MMP applications, facilitating responses to State Personnel questions/processes, and development of Nevada specific electronic system requirements.
- Ms. Jesse directed the analysis of electronic system alternatives including whether to customize a transfer system from another state or procure a system from a software vendor.

**QuantumMark, LLC, Reno, NV**

**9/2013 – 12/2013**

*Consultant, State of Nevada, Department of Health and Human Services, Division of Public and Behavioral Health*

Facilitated the State's efforts to draft regulations for dispensaries, cultivators, manufacturers and laboratories.

- Provided suggestions for language on specific regulations after surveying language on similar topics from other states.
- Facilitated the development of an operating budget for the MMP for the initial three months of the program.

**QuantumMark, LLC, Reno, NV**

**4/2013 – 12/2013**

*Consultant, State of Nevada, Department of Health and Human Services, Division of Public and Behavioral Health Substance Abuse Prevention & Treatment Agency (SAPTA)*

Facilitated SAPTA and SAPTA Provider activities in preparation for the mandated 2014 Medicaid Billing Process.

- Developed individual Implementation Plans for each Provider to become Medicaid billing ready.
- Facilitated application submittal to Medicaid, creation and customization of HP and SAPTA training materials for Providers, development of transition tools and materials.
- Developed Post-Medicaid implementation plan for Providers, conducted follow-up training sessions, and assisted Providers with completing contracts and the approval process.
- Conducted regular status meetings, Focus Groups and Project Team meetings.

**QuantumMark, LLC, Reno, NV**

**3/2013 – 4/2013**

*Consultant, State of Nevada, Department of Health and Human Services, Division of Health Substance Abuse Prevention & Treatment Agency*

Assisted in conducting a Needs Assessment related to changes to the SAPTA program brought about by the expansion to Medicaid. Activities involved:

- Conducting brainstorming sessions to build consensus for change
- Identification of the core processes of the SAPTA program.
- Identifying issues and known deficiencies associated with

**Target/Store Team Leader**  
Reno, Nevada

**9/2006 – 12/2012**

As the Team Leader for Target, Ms. Jesse was accountable for a \$50.0 million store. She was responsible for and led a store of 200 team members, providing leadership, driving high level of guest experience, and building excellent team morale. Her responsibilities included:

- Directing all merchandising, operational, and personnel functions to ensure an impactful and quality store experience for guest.
- Attain maximum profits, sales, return on investment, guest good will, and team member satisfaction.

**Vice President/General Manager, Macy's Reno**

**5/2001 – 9/2005**

As the Vice President/General manager Ms. Jesse was accountable for an \$85.0 million store, achieving Top 3 store performance and profitability for four consecutive years. Duties included:

- Directing all activities related to achievement of superior customer service. As a result of her hard work she was awarded Service Leadership Award Fall 2004.
- Ensured correct merchandise flow, outstanding store maintenance, expense management, shortage prevention, human resource management, and sales support function performance.
- She was also responsible for development of a team of 18 executives, actively coaching and counseling to their fullest potential and maximization of business opportunities, because of this she was awarded Sales Manager of the Year 2004.
- Ms. Jesse possesses a strong leadership profile and ability to build management partnerships within all levels of organizations.

**Divisional Merchandise Manager, Macy's Divisional Offices, San Francisco 9/1998 – 5/2001**

As the Divisional Merchandise Manager Ms. Jesse was responsible for overseeing the execution of merchandise selection and procurement for the men's and women's fragrance division, with sales of \$175.0 million annually. During her time in this position she achieved #1 trend in sales in 2000 across all Federated divisions. She also managed, coached, and developed buying staff, fostering an environment which promoted personal development and achievement of goals. Her duties included:

- Ensuring that promotional strategies and marketing supported the financial objectives of the division,
- Negotiating total vendor support of over \$5.0 million annually.
- Creating competitively dominant merchandise presentations through strengthening of market relationships and maximizing product trend.



**Appendix E – Draft Work Plan**

ID	Task Name	Start	Finish	Predecessors	Resource Names	Or-Site	2015 Aug
1	WV Vital Records Project						
2	Project Initiation (4.1)	Mon 4/10/17	Wed 6/16/18				
3	Project Kickoff	Mon 4/10/17	Wed 6/10/17				
4	Prepare for trip	Mon 4/10/17	Wed 6/10/17				
5	Travel to WV	Sun 4/16/17	Thu 4/13/17		Diane[50%],Petra		
6	Project initiation tasks	Mon 4/17/17	Sun 4/16/17 4FS+1 day		Petra	WV	
7	Travel to RNO	Fri 4/21/17	Fri 4/21/17 5		Petra	WV	
8	Finalize Project Management Plan	Mon 4/24/17	Fri 4/21/17 6		Petra		
			Thu 4/27/17 7		Petra		
9	Internal QA	Fri 4/28/17	Fri 4/28/17 8		Petra		
10	Revise	Mon 5/1/17	Mon 5/1/17 9		Petra		
11	Deliver Project Plan to client	Tue 5/2/17	Tue 5/2/17 10FS+1 day		Diane,Petra		
12	Client review	Tue 5/2/17	Tue 5/9/17 11		Client		
13	Revise deliverable	Tue 5/9/17	Wed 5/10/17 12		Petra		
14							
15	Assess the Current Environment (4.2)	Tue 6/2/17	Tue 6/13/17 7				
16	Prepare for trip including deliverable summary format	Tue 5/2/17	Thu 5/4/17 11		Mary Ann,Diane[25%],Petra,Kelly		
17	Travel	Sun 5/7/17	Sun 5/7/17		Mary Ann,Kelly,Petra		
18	Conduct brown papers	Mon 5/8/17	Fri 5/12/17				
19	Birth	Mon 5/8/17	Mon 5/8/17 17		Mary Ann	WV	
20	Death	Tue 5/9/17	Tue 5/9/17 19		Mary Ann	WV	
21	Registration	Mon 5/8/17	Mon 5/8/17 17		Petra	WV	
22	Amendments	Tue 5/9/17	Tue 5/9/17 19		Petra	WV	
23	POS	Thu 5/11/17	Fri 5/12/17 29		Petra	WV	
24	ITOP	Wed 5/10/17	Wed 5/10/17 20		Mary Ann	WV	
25	B/D Match	Wed 5/10/17	Wed 5/10/17 20		Mary Ann	WV	
26	Extracts	Thu 5/11/17	Thu 5/11/17 25FS+0.5 day		Mary Ann	WV	
27	Other areas found during visit	Thu 5/11/17	Fri 5/12/17 26		Mary Ann	WV	
28	Answer any remaining questions	Fri 5/12/17	Fri 5/12/17 23		Petra	WV	
29	Document technical environment	Wed 5/10/17	Thu 5/11/17 25		Petra	WV	
30	Travel	Fri 5/12/17	Mon 5/15/17 29		Mary Ann,Petra		
31	Create deliverable	Mon 5/15/17	Mon 5/29/17 30		Mary Ann,Petra		
32	Internal QA	Mon 5/29/17	Tue 5/30/17 31		Diane		
33	Revise based on feedback	Wed 5/31/17	Thu 6/1/17 32FS+1 day		Petra		
34	Deliver to Client	Thu 6/1/17	Thu 6/1/17 33		Petra		
35	Client review	Thu 6/1/17	Thu 6/8/17 34		Client		
36	Revise deliverable	Thu 6/8/17	Mon 6/12/17 35		Petra,Diane[20%]		
37	Client review and sign off	Mon 6/12/17	Tue 6/13/17 36				

ID	Task Name	Start	Finish	Predecessors	Resource Names	On-Site	2015 Aug
39	<b>Develop Business and System Requirements (4.3)</b>	Mon 4/10/17	Fri 9/8/17				
40	<b>Part A: Visioning</b>	Mon 4/10/17	Mon 6/23/17				
41	Prepare for Visioning Sessions	Thu 6/1/17	Thu 6/8/17 34		Petra,Diane		
42	Revise visios	Thu 6/8/17	Wed 6/14/17 41		Beckey ,Petra		
43	Travel to WV	Sun 6/18/17	Sun 6/18/17		Petra,Diane		
44	Conduct visioning sessions	Mon 4/10/17	Mon 6/26/17				
45	Birth	Mon 6/19/17	Mon 6/19/17 43		Diane,Petra	WV	
46	Death	Tue 6/20/17	Tue 6/20/17 45		Petra,Diane	WV	
47	Registration	Wed 6/21/17	Wed 6/21/17 46		Petra,Diane	WV	
48	Amendments	Thu 6/22/17	Thu 6/22/17 47		Petra,Diane	WV	
49	PCS	Fri 6/23/17	Fri 6/23/17 48		Diane,Petra	WV	
50	Travel to RNO	Fri 6/23/17	Mon 6/26/17		Diane,Petra		
51	Other areas	Mon 4/10/17	Fri 4/14/17		Petra		
52	Create deliverable	Mon 4/17/17	Fri 4/21/17 51		Diane[10%],Beckey [10%],Petra		
53	Internal QA	Mon 4/24/17	Tue 4/25/17 52		Diane		
54	Revise based on feedback	Wed 4/26/17	Thu 4/27/17 53		Petra,Beckey [10%]		
55	Deliver to Client	Fri 4/28/17	Fri 4/28/17 54		Kely,Petra		
56	Client review	Fri 4/28/17	Fri 5/5/17 55		Client		
57	Revise deliverable	Fri 5/5/17	Mon 5/8/17 56		Kely,Petra		
58	Client review and sign off	Mon 5/8/17	Tue 5/9/17 57				
59							
60	<b>Part B: JAD Sessions</b>	Fri 4/28/17	Fri 8/4/17				
61	Review WV statutes and other info for requirements	Fri 4/28/17	Mon 5/1/17 54		Kely		
62	Update templates	Tue 5/2/17	Mon 5/8/17 61		Petra[50%], Kely[50%]		
63	Logistics for visit	Fri 4/28/17	Mon 5/1/17 54		Petra		
64	Prepare for sessions	Tue 5/9/17	Thu 5/11/17 32		Petra,Mery Ann		
65	Travel to WV	Sun 7/23/17	Sun 7/23/17		Petra,Mery Ann,Kely,Suzanne		
66	<b>Conduct JAD Sessions</b>	Mon 7/24/17	Mon 7/31/17				
67	Birth data entry and registration	Mon 7/24/17	Mon 7/24/17 65		Petra,Mery Ann	WV	
68	Paternities	Mon 7/24/17	Mon 7/24/17 67		Mery Ann,Petra	WV	
69	Birth amendments	Mon 7/24/17	Tue 7/25/17 68		Mery Ann,Petra	WV	
70	Fetal Death	Tue 7/25/17	Tue 7/25/17 69		Mery Ann,Petra	WV	
71	Death data entry and registration	Wed 7/26/17	Wed 7/26/17 70FS+0.5 day		Mery Ann,Petra	WV	
72	Death amendments	Wed 7/26/17	Wed 7/26/17 71		Mery Ann,Petra	WV	
73	Issuance -state	Thu 7/27/17	Thu 7/27/17 72		Mery Ann,Petra	WV	
74	Issuance - LHD	Thu 7/27/17	Thu 7/27/17 73		Mery Ann,Petra	WV	
75	Accounting and Inventory	Fri 7/28/17	Fri 7/28/17 74		Petra,Mery Ann	WV	
76	Travel to Reno	Fri 7/28/17	Mon 7/31/17		Mery Ann,Petra		
77	Technical	Mon 7/24/17	Tue 7/25/17 65		Suzanne,Kely	WV	
78	Interfaces	Wed 7/26/17	Wed 7/26/17 77		Suzanne,Kely	WV	
79	Travel to Reno	Thu 7/27/17	Fri 7/28/17		Suzanne,Kely		
80	ITOP	Mon 7/31/17	Mon 7/31/17 75FS+1 day		Mery Ann,Petra		
81	Report	Tue 8/1/17	Wed 8/2/17 80FS+1 day		Mery Ann,Petra		
82	B/D Match	Thu 8/3/17	Thu 8/3/17 81FS+1 day		Mery Ann,Petra		
83	Sign off of Part B	Thu 8/3/17	Fri 8/4/17 82		Client		

ID	Task Name	Start	Finish	Predecessors	Resource Names	On-Site	2015 Aug
84	<b>Part C: Updated Requirements</b>	Fri 8/4/17	Fri 8/8/17				
85	Update requirements based on JADs	Fri 8/4/17	Fri 8/16/17 83		Petra(50%),Kelly(50%),Diane(20%)		
86	Internal QA	Fri 8/16/17	Fri 9/1/17 85		Diane,Suzanne		
87	Client Review of requirements	Thu 8/10/17	Thu 8/24/17 85FF+4 days		Client		
88	Revisions to requirements based on feedback	Thu 8/24/17	Thu 8/31/17 87		Petra,Kelly,Diane(10%)		
89	Client review of revisions	Thu 8/31/17	Thu 9/7/17 88		Client		
90	Sign off	Thu 9/7/17	Fri 9/8/17 89		Client		
91							
92	<b>Report Detailing Mandatory Requirements (4.4)</b>	Fri 8/18/17	Wed 9/6/17				
93	Agree on Mandatory Requirements	Fri 8/18/17	Tue 8/22/17 85		Petra		
94	Develop Deliverable	Tue 8/22/17	Wed 8/23/17 93		Petra		
95	Internal QA	Thu 8/24/17	Thu 8/24/17 94		Diane		
96	Revised based on feedback	Fri 8/25/17	Fri 8/25/17 95		Petra		
97	Client review	Mon 8/28/17	Fri 9/1/17 96		Client		
98	Revise based on feedback	Mon 9/4/17	Mon 9/4/17 97		Petra		
99	Client review of revisions	Tue 9/5/17	Tue 9/5/17 98		Client		
100	Client sign off	Wed 9/6/17	Wed 9/6/17 99		Client		
101							
102	<b>Implementation Plan (4.6)</b>	Tue 9/6/17	Tue 10/24/17				
103	Conduct Meeting to Discuss Implementation Topics	Thu 9/7/17	Wed 9/20/17 100		Diane(50%),Petra,Client(50%)		
104	Collect Data	Tue 9/5/17	Mon 9/18/17 98		Kelly		
105	Draft Implementation Plan Narrative	Thu 9/21/17	Wed 9/27/17 103		Petra		
106	Draft MS Project Schedule	Thu 9/28/17	Mon 10/2/17 105		Petra		
107	Internal QA	Tue 10/3/17	Wed 10/4/17 106		Diane		
108	Revised based on feedback	Thu 10/5/17	Fri 10/6/17 107		Diane		
109	Client review	Mon 10/9/17	Fri 10/13/17 108		Client		
110	Revise based on feedback	Mon 10/16/17	Wed 10/18/17 109		Diane		
111	Client review of revisions	Thu 10/19/17	Mon 10/23/17 110		Client		
112	Client sign off	Tue 10/24/17	Tue 10/24/17 111		Client		
113							
114	<b>Stakeholder Tour (4.3)</b>	Thu 10/19/17	Tue 12/19/17				
115	Prepare for Tour	Thu 10/19/17	Wed 11/1/17 110		Kelly,Client		
116	QM Partner Assistance and Internal QA	Thu 11/2/17	Wed 11/8/17 115		Diane		
117	Travel to WV	Thu 11/9/17	Fri 11/10/17 116		Kelly		
118	Conduct Tour	Mon 11/13/17	Mon 11/27/17 117FS+1 day		Kelly	WV	
119	Travel to RNO	Mon 11/27/17	Tue 11/28/17 118		Kelly	WV	
120	Debrief with client and agree on any changes to requirements and/or implementation plan	Tue 11/28/17	Thu 11/30/17 119		Kelly,Petra,Client		
121	Make changes	Thu 11/30/17	Thu 12/7/17 120		Kelly,Petra		
122	Internal QA	Thu 12/7/17	Tue 12/12/17 121		Suzanne		
123	Client review	Tue 12/12/17	Tue 12/19/17 122		Client		

ID	Task Name	Start	Finish	Predecessors	Resource Names	On-Site	2018
126	<b>Cost / Benefit Analysis / Budget (4.5)</b>	Wed 10/25/17	Thu 1/25/18				Aug
126	Prepare for and kick off with client	Wed 10/25/17	Tue 11/7/17	112	Mary Ann,Suzanne[10%]		
127	Gather Data	Wed 11/8/17	Tue 12/5/17	126	Mary Ann,Suzanne[10%]		
128	Create budgets	Wed 12/6/17	Tue 1/2/18	127	Mary Ann,Suzanne[10%]		
129	Draft document with assumptions	Wed 1/3/18	Fri 1/5/18	128	Mary Ann,Suzanne[10%]		
130	Internal QA	Mon 1/8/18	Tue 1/9/18	129	Suzanne,Petra		
131	Revised based on feedback	Tue 1/9/18	Fri 1/12/18	130	Mary Ann		
132	Walk through with client	Fri 1/12/18	Fri 1/12/18	131	Petra,Mary Ann		
133	Client review	Fri 1/12/18	Fri 1/19/18	132	Client		
134	Revise	Fri 1/19/18	Tue 1/23/18	133	Mary Ann		
135	Client reviews revisions	Tue 1/23/18	Wed 1/24/18	134	Client		
136	Client Sign off	Wed 1/24/18	Thu 1/25/18	135	Client		
137							
138	<b>Procurement of New System (4.7)</b>	Mon 4/17/17	Wed 5/16/18				
139	<b>Part A: Draft RFP</b>	Mon 4/17/17	Thu 1/4/18				
140	Conduct meetings with Procurement	Mon 4/17/17	Mon 4/17/17	5	Diane,Petra		
141	Review terms and conditions	Mon 5/1/17	Thu 5/4/17	140FS+10 da	Petra		
142	Review State template	Thu 5/11/17	Tue 5/16/17	141FS+5 day	Petra		
143	Draft RFP Scope	Mon 10/16/17	Fri 11/3/17	109	Diane[25%],Petra		
144	Internal QA	Mon 11/6/17	Fri 11/10/17	143	Diane		
145	Review with State	Mon 11/13/17	Mon 11/13/17	144	Diane,Petra		
146	State Review	Mon 11/13/17	Mon 11/20/17	145	Client		
147	Revise based on feedback	Mon 11/20/17	Thu 11/23/17	146	Diane		
148	Lag time for Procurement Review and Revision	Thu 11/23/17	Thu 1/4/18	147	Client		
149	<b>Part B: Conduct Procurement</b>	Thu 1/4/18	Wed 2/21/18				
150	Issue RFP	Thu 1/4/18	Fri 1/5/18	148	Client		
151	Lag time for vendors to prepare responses	Fri 1/5/18	Fri 2/16/18	150	Diane[5%]		
152	Receive vendor responses	Fri 2/16/18	Mon 2/19/18	151	Client		
153	Review for mandatory requirements	Mon 2/19/18	Wed 2/21/18	152	Client		
154	<b>Part C: Assist State with Review</b>	Wed 2/21/18	Wed 5/16/18	153			
155	Distribute to Review Committee	Wed 2/21/18	Thu 2/22/18		Client		
156	Review responses	Thu 2/22/18	Thu 3/1/18	155	Diane		
157	Evaluation Committee meetings	Thu 3/1/18	Tue 3/6/18	156	Diane,Petra	WV	
158	Conduct demos	Thu 3/8/18	Tue 3/13/18	157FS+5 day	Diane,Petra	WV	
159	Intent to Award	Tue 3/13/18	Wed 3/14/18	158			
160	Contract Negotiations	Wed 3/14/18	Wed 5/16/18	159	Diane[10%]		
161							



ID	Task Name	Start	Finish	Predecessors	Resource Names	On-Site
162	<b>Project Management</b>	Mon 6/1/17	Mon 1/8/18			2015 Aug
163	Bi-Weekly Meetings with Sponsor	Mon 6/1/17	Mon 1/8/18			
164	Bi-Weekly Meetings with Sponsor 1	Mon 5/1/17	Mon 1/8/18			
165	Bi-Weekly Meetings with Sponsor 2	Mon 5/1/17	Mon 5/1/17		Petra, Diane[5%]	
166	Bi-Weekly Meetings with Sponsor 3	Mon 5/15/17	Mon 5/15/17		Petra, Diane[5%]	
167	Bi-Weekly Meetings with Sponsor 4	Mon 5/29/17	Mon 5/29/17		Petra, Diane[5%]	
168	Bi-Weekly Meetings with Sponsor 5	Mon 6/12/17	Mon 6/12/17		Petra, Diane[5%]	
169	Bi-Weekly Meetings with Sponsor 6	Mon 6/26/17	Mon 6/26/17		Petra, Diane[5%]	
170	Bi-Weekly Meetings with Sponsor 7	Mon 7/10/17	Mon 7/10/17		Petra, Diane[5%]	
171	Bi-Weekly Meetings with Sponsor 8	Mon 7/24/17	Mon 7/24/17		Petra, Diane[5%]	
172	Bi-Weekly Meetings with Sponsor 9	Mon 8/7/17	Mon 8/7/17		Petra, Diane[5%]	
173	Bi-Weekly Meetings with Sponsor 10	Mon 8/21/17	Mon 8/21/17		Petra, Diane[5%]	
174	Bi-Weekly Meetings with Sponsor 11	Mon 9/4/17	Mon 9/4/17		Petra, Diane[5%]	
175	Bi-Weekly Meetings with Sponsor 12	Mon 9/18/17	Mon 9/18/17		Petra, Diane[5%]	
176	Bi-Weekly Meetings with Sponsor 13	Mon 10/2/17	Mon 10/2/17		Petra, Diane[5%]	
177	Bi-Weekly Meetings with Sponsor 14	Mon 10/16/17	Mon 10/16/17		Petra, Diane[5%]	
178	Bi-Weekly Meetings with Sponsor 15	Mon 10/30/17	Mon 10/30/17		Petra, Diane[5%]	
179	Bi-Weekly Meetings with Sponsor 16	Mon 11/13/17	Mon 11/13/17		Petra, Diane[5%]	
180	Bi-Weekly Meetings with Sponsor 17	Mon 11/27/17	Mon 11/27/17		Petra, Diane[5%]	
181	Bi-Weekly Meetings with Sponsor 18	Mon 12/11/17	Mon 12/11/17		Petra, Diane[5%]	
182	Bi-Weekly Meetings with Sponsor 19	Mon 12/25/17	Mon 12/25/17		Petra, Diane[5%]	
183	<b>Steering Committee</b>	Mon 1/8/18	Mon 1/8/18		Petra, Diane[5%]	
184	Steering Committee 1	Thu 6/8/17	Thu 11/23/17		Petra, Diane	
185	Steering Committee 2	Thu 8/31/17	Thu 8/31/17		Petra, Diane	
186	Steering Committee 3	Thu 11/23/17	Thu 11/23/17		Petra, Diane	