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WV Purchasing Division

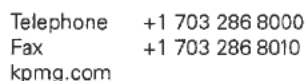
# WorkForce West Virginia

**KPMG Capabilities Overview – Technical Proposal**  
Bolstering WV's Fraud and Equity Programs  
Request for Proposal CRFP WWV2400000001

September 6, 2023

[kpmg.com/us](https://kpmg.com/us)





**We know how to get things done.** KPMG brings a wealth of knowledge to structure and deliver materials on time, and within budget. This is proven through previous work with accelerated timelines for complex projects where delivery was on time throughout the entirety of the project. We understand that every project is unique and will create a plan specific to the demands of Workforce WV's unemployment equity engagement, while incorporating the needs of the project team to maintain productivity through the course of the project. Our interdisciplinary team consists of WIOA and unemployment program policy specialists, labor economists, communications and outreach professionals, and technology professionals who specialize in data collection and system interface; our well-rounded capabilities will help facilitate a successful delivery of your project.

**We have done this before, successfully.** The concept of “equity” is integrated in work we do for public programs: this includes addressing disparities in accessing government programs facing individuals and communities including, but not limited to, low wage workers, Black and Hispanic/Latinx workers, individuals with disabilities, veterans, and individuals with limited English proficiency, women, and individuals living in rural areas. KPMG takes a systematic approach to embed fairness in decision making processes and eliminating barriers to access to serve all eligible individuals/benefit recipients.

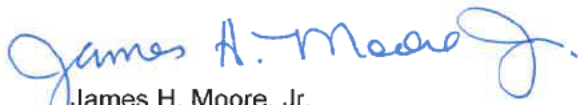
**We bring you the right team.** Your KPMG team has decades of experience leading, offering in, and contributing thought leadership for labor and workforce development organizations. Our representative state workforce clients include the Department of Employment Services in the District of Columbia, Florida Department of Economic Opportunity, Massachusetts Executive Office and Labor and Workforce Development, California Employment Development Department, New Jersey Department of Labor & Workforce Development, Tennessee Labor & Workforce Development, and Pennsylvania Department of Labor and Industry. We bring relevant thought leadership and experience performing various unemployment insurance tasks including research, facilitating meetings, and developing data analytics and forecasting, system modernization, business process improvement, and communications and outreach strategy.

In closing, we emphasize our commitment to this project and to the State of West Virginia. We want to highlight one final point: **We want to work with you.** With KPMG, you will receive high reliability, professionalism, and client service. This proposal emphasizes your business's importance to me, my engagement team, and our firm and how eager we are to develop and continue a mutually beneficial working relationship with you.

We thank you for this opportunity to propose. Please do not hesitate to contact me with any questions regarding our response via email at [jamesmoore@kpmg.com](mailto:jamesmoore@kpmg.com) or 301-919-9046.

Very truly yours,

KPMG LLP

  
James H. Moore, Jr.  
Principal

# Title page

Request for proposal CRFP WWV 2400000001 Unemployment Equity Project

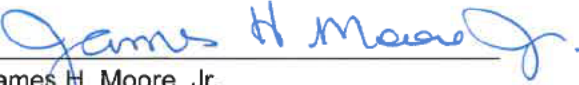
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James H. Moore, Jr.  
Principal

September 6, 2023



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**Who we are**

## KPMG International Cooperative

**KPMG International** is a global network of professional member firms providing audit, tax, and advisory services. Member firms of the KPMG network operate in 143 countries and territories with more than **265,000 partners and professionals**.

**KPMG LLP (KPMG)** is the U.S. member firm of KPMG International, tracing its origins back to 1897. Since 1994 KPMG has been a limited liability partnership registered in the state of Delaware, with more than **40,000 professionals**, including more than **2,200 partners**, in more than 90 offices.

KPMG in the U.S. is operating in all 50 states and headquartered in New York.

### KPMG's experience serving the public sector

KPMG has been serving the public sector for over 100 years with a proud legacy of success. With more than 1,000 partners and professionals focused on state and local government, including

Workforce transformation, KPMG is one of the largest consultancies in the United States. As demonstrated in other state engagements, our practice holds a strong reputation for quality, consistency, and integrity demonstrated through more than 50 years of experience with transformational projects in the public sector.

Public sector consulting, including Workforce and UI transformation, is a core capability of KPMG's Health and Government Solutions (HGS) practice. By leveraging our Workforce transformation experience in states such as CA, FL, NJ, TN, PA, and DC we have helped our clients navigate the impact to Workforce systems and operations due to the pandemic, aging technology, regulatory compliance, and modernization.



	DC	FL	CA	MA	PA	NJ	TN	US DOL
Project Management & Governance Support	•	•	•	•		•	•	
Strategic Planning		•	•			•	•	•
Customer Journey Maps		•	•					
Current State Operations & Technical Assessment	•	•	•		•			•
IT Systems & Interfaces Inventory Assessment	•	•	•		•			
Gap Analysis & Target Operating Models	•	•	•			•	•	•
Roadmap & Alternatives		•	•		•			
Modernization Cost Assessment			•					
Future State Processes & Requirements	•	•	•					
Organizational Change Management Plan	•		•	•				
Legal, Regulatory, & Compliance Inventory	•	•	•			•	•	
Funding Stream Analysis	•							
Knowledge Transfer	•	•	•					•
Other*	•	•	•	•	•			•

KPMG has made serving the public sector a key focus of our business and our future. KPMG has assisted public sector organizations of all types, including federal agencies, states, cities, counties, school districts, public hospitals, finance authorities, transit authorities, and virtually all other institutions that serve the public. KPMG anticipates the challenges organizations face because of legislative changes, economic trends, and citizen needs. Additionally, we realize that today's fast-paced economy and business world requires attentiveness to detail—since it influences the business of public sector entities today and tomorrow.

## KPMG's data analytics capability

**KPMG's Data Analytics and Economic Consulting Team** offers a range of economic and data analytics consulting services. Our team is very knowledgeable at applying rigorous and innovative data analysis approaches that will provide WorkForce WV with industry leading data analytics services, with an exemplary track record in leveraging data analysis to establish and streamline processes that allow our clients to fulfill their mission and performance goals effectively and efficiently.



KPMG professionals with specialized knowledge and practical experience in economics, policy analysis, and statistics can provide advanced economic, quantitative, and statistical analysis to support a variety of policy analysis. Organizations often require economic and statistical consulting services to understand the impacts of current and contemplated activities and emerging legislation and regulations, as well as to evaluate strategic business planning. Using leading econometric and statistical modeling techniques and methodologies—including proprietary models— professionals support data-driven and evidence-based decision making for our public and private sector clients. This team consists of highly qualified staff and PhD- and Masters-level analysts, economists and statisticians with requisite experience and subject matter knowledge to deliver results and meet our clients’ critical requirements. The infographic below depicts the range of services provided by KPMG.

Capabilities at a glance



## Business intelligence and reporting capabilities

Data and analytics capabilities and data ecosystems have made a leap forward in recent years. The volume of available data has grown exponentially, more sophisticated algorithms have been developed, and computational power and storage have steadily improved. The convergence of these trends is fueling rapid technology advances and business disruptions across all industries but more so for more innovation in analytics in the unemployment insurance space. KPMG recognizes that proactive risk monitoring is the key to future readiness.

In the past we successfully conducted activities and provided tools below and provided solutions to our clients. These tools were integrated into clients' existing configuration or being hosted as cloud solutions.

- **Data ingestion:** Feeds of existing sources. Feeds of unstructured data (contracts, forms, etc.). Feeds of structured from new sources (social media, etc.).
- **Data governance:** The ability to manage the lifecycle of the data in a manner to be secure, understand where copies of the data may reside, protect it, and allow for the necessary audit trail.
- **Data processing:** This is where the cleaning, normalizing, linking of data across several data sources to build the full journey.
- **Advanced analytics:** Using machine learning, predictive modeling to continue be turning the models to provide action insights based on predictable and unpredictable rules powered by a flexible and configurable rules library.
- **Reporting:** The visualization set of tools that can be viewed online and quickly to understand problem areas that may require potential deep dive, etc.

Each of the above components has the flexibility to be built and fully integrated into the WorkForce WV ecosystem or partially implemented depending on the performance, scalability, and security requirements. We accelerate results by applying domain and business experience to visualization development. Our professionals work across multiple leading-edge technologies by applying design thinking and user experience to development process.

## KPMG's business transformation capability

**KPMG Transformation Delivery** works closely with clients to make sure that transformation outcomes align with business objectives and strategic ambition. From strategy and planning through execution and sustainment, we remain focused on outcomes, people, and the importance of "working the plan. By doing these things in a consistent and intentional way, we are **integrating transformational value** into relevant level of the enterprise.

### How do we deliver value?

#### Architect for outcomes

We architect transformation programs based on the outcomes and business value that our clients expect, and we execute with a consistent focus on delivering those outcomes.

#### Develop clear, executable plans

We help enable seamless execution by building logical, time-bound roadmaps and integrated schedules that reduce risk, focus on achievable milestones, and allow teams to work the plan.

#### Connect strategy to execution

By establishing clear priorities for in-scope capabilities and linking to the Target Operating Model, we enable objective decisioning and focus execution on the important things for stakeholders.

#### Help enable transparent, fact-based governance

We establish effective governance structures and integrated insight reporting that help enable timely decision making, facilitate prioritization, promote early identification of risk, and monitor success metrics through all phases of the transformation.

#### Define the users' transformation journey

Taking a human-centric approach to design and change that helps enable the employee experience (both end-users and transformation team) to be front and center from vision through deployment, addressing pain points and gain points for faster and lasting adoption.

#### Accelerating speed-to-value

In order to realize business value more quickly, we leverage modern delivery methods to build minimum viable products that meet client needs while creating platforms for evolution and expansion.

#### Accelerate adoption via design thinking

Utilizing design thinking throughout the transformation programs to create future state designs that directly address pain points and help enable the right experiences for customers and employees.

#### Sustain success for the long term

By developing the infrastructure to transition knowledge and resources into the organization, we are able to sustain further evolution of the value delivered after the transformation concludes.

## Qualifications and experience

KPMG is proud to present our robust portfolio of qualifications and experiences tailored to meet your specific requirements. Our credentials include:

### **Claimant communication and outreach:**

- We have supported several states engaged in improving equity through enhanced communication and outreach, such as the Paid Family Leave Program in the District of Columbia and Reemployment Assistance in Florida.
- Our strategies have been particularly effective at targeting and reaching underrepresented populations by increasing program awareness and benefits usage. We have successfully identified these groups using advanced data analysis tools and customized communication to cater to their specific needs.
- Our efforts in simplifying communications and launching targeted outreach campaigns are dynamic and expected to significantly reduce perceived access barriers, fostering a more inclusive environment for all claimants.

### **Demographic data collection:**

- Over the years, we've assisted numerous clients in expanding and refining their demographic data collection systems. For example, we assisted the District of Columbia and a large city on the west coast to collect, analyze, and present demographic data to inform decision making.
- By leveraging advanced analytics, our work is expected to help discern unemployment inequality patterns and trends, offering actionable insights to organizations for informed decision-making.

### **Measuring delivery of benefits and claimants experience:**

- KPMG has a demonstrated track record of implementing tools and methodologies that measure the delivery of benefits and the holistic claimant experience in states including CA, FL, PA, and DC.
- We incorporate behavioral science and human-centered design principles to get a granular understanding of the claimant's needs and preferences.
- Our experience extends to journey mapping and modeling technology, which we have utilized to identify claimant and employer pain points. Addressing these pain points has consistently led to higher rates of customer satisfaction and enhanced claim accessibility.

### **Our approach and methodology:**

KPMG employs a comprehensive approach that synergizes the power of data analytics, human-centric design, and industry leading practices. Our methodology involves:

- **Data-driven decision-making:** By gathering and analyzing demographic and behavioral data, we have created tailored strategies that are expected to resonate with the targeted claimant groups.
- **Human-centered design:** This helps ensure that the solutions are practical and user-friendly, boosting engagement and satisfaction levels.
- **Continuous feedback loop:** We believe in a cyclical model of implementation, feedback, and improvement within the required contract timeframe, helping to ensure that our solutions remain adaptive and responsive to evolving needs.



**Comparative analysis:**

While various approaches address the outlined challenges, KPMG's highly integrated and robust methodology will help ensure that we deliver high quality work to Workforce WV. Some other approaches may focus solely on data analytics or behavioral science. In contrast, our integrated approach helps ensure that all facets of the problem are addressed, resulting in a comprehensive solution that helps improve outcomes. Regarding potential limitations, an integrated approach requires diligent management to help ensure all components work harmoniously. However, given our extensive experience and capability in this domain, we're confident in our ability to deliver superior results for your organization.

To further illustrate our credentials, selected references that highlight our experience in these domains are presented on the next pages.

## References

Please note that contract information of references is confidential.

Reference 1	
Company name:	State of California Employment Development Department (EDD) <a href="#">Employment Development Department   California</a>
Address:	722 Capitol Mall, MIC 62-C, Sacramento, CA 95814
Contact name:	John Yu, Project Director
Alternate contact name:	Rita Gass <a href="mailto:Rita.Gass@edd.ca.gov">Rita.Gass@edd.ca.gov</a>
Phone:	916-214-5345
Email:	<a href="mailto:John.Yu@edd.ca.gov">John.Yu@edd.ca.gov</a>
Description of work:	<p>KPMG LLP (KPMG) provides business process re- engineering (BPR), planning and cost estimation consulting services to the State of California (State) Employment Development Department (EDD) for its Unemployment Insurance (UI), Disability Insurance (DI), and Paid Family Leave (PFL) programs. The consulting work provides input that helps EDD plan for its transformation program, known as EDDNext. EDDNext is a multiyear customer-centric business process and technical modernization effort that aims to:</p> <ol style="list-style-type: none"> <li>1. Enhance customer-centric service design – help ensure equity access via improving the efficiency of service channels with multiple- languages access (mobile, social media, self-service website, live chat,).</li> <li>2. Increase self-service opportunities – simplify self-service functionality across all programs for claims intake and processing.</li> <li>3. Mitigate fraud – protect claimant identity, reduce fraudulent activities, and reduce the costly risk to the State by re- engineering claims processing and enhancing technology- driven security.</li> <li>4. Improve consistent &amp; integrated program delivery – extend data analytics (dashboards, daily reporting on claims progress, fraud analysis, standardize user experience, enhance EDD training to better serve claimants.</li> <li>5. Greater adaptability for faster program changes – integrated system that helps enable rapid program changes and is scalable to meet the unusual spikes in workload demand &amp; modifications,</li> </ol>
Summary of Engagement Activities	Required for compliance with USDOL and California rules/regulations.
Service dates:	October 2021 – Present
Approximate contract value:	\$10,000,000

Reference 2	
Company name:	DC Department of Employment Services (DOES) 202.724.5220 <a href="#">Office of Unemployment Compensation (dc.gov)</a>
Address:	4058 Minnesota Avenue NE Washington, DC 20019
Contact name:	Dr. Unique Morris-Hughes, Director, DC Department of Employment Services 202.724.5220 <a href="mailto:Unique.Morris-Hughes2@dc.gov">Unique.Morris-Hughes2@dc.gov</a>
Alternate contact name:	Monnikka M. Madison DC Department of Employment Services 202.345.6373 <a href="mailto:monnikka.madison@dc.gov">monnikka.madison@dc.gov</a>
Phone:	202.724.5220
Email:	<a href="mailto:Unique.Morris-Hughes2@dc.gov">Unique.Morris-Hughes2@dc.gov</a>
Description of work:	<p>KPMG was engaged by DOES to support Independent Verification and Validation (IV&amp;V) and improve unemployment insurance business processes. The workstreams include:</p> <ol style="list-style-type: none"> <li>1 Policy – equipped DOES to increase DOL compliance and implement surge of Unemployment Insurance Program Letters (UIPLs)</li> <li>2 Compliance – identified fraud trends and priority areas of focus to solve and prevent future occurrences.</li> <li>3 Communications – established firm external and internal outreach strategy to communicate key changes and engage with the public. One major outcome is an upgraded UI website which received over 10k hits within two days of launch and plain language updates Reduced to 5th grade reading level from the original college level.</li> <li>4 Training – implemented new courses in the automated Learning Management System (LMS) and overhauled/updated the five-year old UI training curriculum.</li> <li>5 Budget/Grants – developed one-stop shop tool for leaders to proactively manage budget and grants activities.</li> </ol>
Summary of Engagement Activities	<p>Operations and Maintenance – collaborated with legacy system integrator to help ensure releases are tested and achieve DOES objectives and target release dates through the peak of the pandemic.</p> <p>Independent Verification and Validation (IV&amp;V) – evaluated processes, models, and provide leading practices throughout the IT lifecycle.</p>
Service dates:	April 1, 2021 - April 21, 2022
Approximate contract value:	\$3,000,000

## Past projects

### KPMG qualification #1: District of Columbia (DC) WIOA Program Evaluation and Visualization

**Start and end date** May 2019 – October 2019

**Organization** District of Columbia, Department of Employment Services

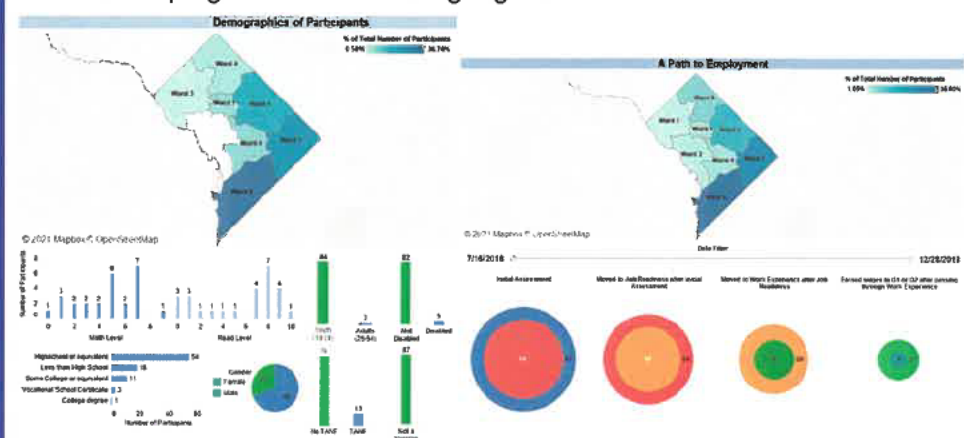
**Scope of work** DC Career Connections (DCCC) is a work readiness program designed to provide more than 400 out-of-school and unemployed young adults with opportunities to gain valuable work experience, skills training, and individualized coaching and support to obtain employment. Project Empowerment is a transitional employment program (TEP) for District residents who are between the ages of 22-54 and are having trouble finding employment because of a multitude of barriers.

The Client had the following needs:

- Wanted to better understand and monitor the results of its TEP and DCCC programs
- Desired to understand the key factors that drive the success of these programs
- Used visualization tools and executive dashboards to help leadership understand program staff workload for programs

Our scope of work included using data visualization tools to help Dept. of Employment Services (DOES) understand workforce development and work experience of applicants in these two programs. We also applied machine learning models to identify factors that drive success in employment after applicants' enrollment in these programs.

- Services provided**
- Conducted interviews with TEP and DCCC program staff and gained insights about program enrollment, training provided to applicants, and program outcomes.
  - Established tableau dashboards (see examples below) using 2018 – 2019 TEP and DCCC program data.
  - Conducted statistical analysis to predict success of employment.
  - Evaluated program outcomes using regression models.





KPMG qualification #2: State of Massachusetts Labor Market Information and Data Modernization	
Start and end date	May 2020 – August 2020
Organization	State of Massachusetts, Workforce Development Offices
Scope of work	The state of Massachusetts' Workforce Development office was seeking a structured approach to modernize and standardize ways to proactively deliver key economic data to the state's users and consumers of economic information. The goal was to improve the access to economic data and labor market insights for the department's key stakeholders and customers including other state executive offices and social services, the larger public and private workforce development network, and constituents. Working together with key state leadership, KPMG leveraged Labor Market Information leading practices and customized an approach specific to this state's services and programs.
Services provided	<ul style="list-style-type: none"> <li>• Conducted an in-depth assessment of the current state organization, inventorying existing processes across the Department and interviewing partners and staff to identify current pain points and gaps.</li> <li>• Developed target operating model and future state organizational model recommendations to support a unified experience for the Department's partners and customers.</li> <li>• Hosted a series of working sessions allowing staff and partners to deconstruct real life-operating model scenarios and pinpoint critical customer needs.</li> <li>• Assessed the organization's readiness to transition and developed a tailored change management and transition strategy to sustain employee engagement and communication through the change.</li> </ul>

### KPMG qualification #3: Employment and Training Program Improvements for TANF and SNAP Recipients

Start and end date	June 1, 2018 – June 30, 2022
Organization	Pennsylvania Department of Human Services (DHS) Office of Income Maintenance (OIM), Bureau of Employment and Training Programs (BEP)
Scope of work	The KPMG Harrisburg team supported the Pennsylvania Department of Human Services (DHS) Office of Income Maintenance (OIM), Bureau of Employment and Training Programs (BEP) in a multi-year effort to improve employment and training programs provided to assist recipients of the Temporary Assistance for Needy Families (TANF) and Supplemental Nutrition Assistance Program (SNAP) benefits. DHS has undertaken an initiative to redesign its employment and training programs to better meet the needs of recipients and their families as they move toward employment and self-sufficiency. Changes center on whole-person focused support as recipients prepare to excel in family-sustaining education, training, and jobs. KPMG provided support across each of six employment and training programs available to TANF and SNAP recipients: Employment Advancement and Retention Network (EARN), Work Ready, SNAP 50/50, Keystone Education Yields Success (KEYS), Education Leading to Employment and Career Training (ELECT), and Refugee Resettlement Program (RRP).
Services provided	<ul style="list-style-type: none"> <li>As-is Feedback Assessment – a final report that included an overview of the six employment and training (E&amp;T) programs, findings from key stakeholder group interviews (PA DHS County Assistance Offices, E&amp;T contracted program vendors, advocates, and TANF recipients via regional town hall focus groups), and seven areas of future program improvements.</li> <li>Strategy and Planning Support – facilitating of the identification, prioritization, and planning associated with the tactical implementation of the E&amp;T program, policy, and procedural changes.</li> </ul> <p>Project Management – establishing project governance, developing detailed project plans, facilitating over ten specific project team threads, and reporting ongoing project status.</p>

#### KPMG qualification #4: Department of Employment Services (DOES) Paid Family Leave (PFL) Program Business Transformation

Start and end date	April 1, 2020 - Present
Organization	District of Columbia's Department of Employment Services
Scope of work	DOES engaged KPMG to assist with a business transformation effort for a paid leave program for the District of Columbia under the provisions of the Universal Paid Leave Amendment Act of 2016.
Services provided	<ul style="list-style-type: none"> <li>Assisted our client to apply a combination of automated budgeting and forecasting capabilities that give DOES management an insightful tool for future planning, reporting, and analysis to help manage financial expectations for future periods. These financial forecasts are visualized in dashboards that can be shared internally. The resulting dynamic reports can be run on-demand, anytime, and from anywhere with just an internet connection and a web browser.</li> <li>Worked with DOES to implement a Transformation Strategy and Communications Action Plan for efficient program implementation. We assessed program preparedness at the stakeholder and staff level via interviews, focus groups, surveys, and live polling.</li> </ul> <p>Developed a rigorous Change Champion Mobilization approach to increase engagement throughout all levels of the agency. We also developed a detailed Communications assessment and action plan to help DOES identify and address gaps and challenges in current business processes.</p>

## KPMG team






KPMG has invested aggressively over years in evolving our methods and accelerators specific to UI. We have amassed a proprietary library of leading practices, lessons learned, reference models and proprietary accelerators based on the wealth of UI/Workforce engagements we have already conducted across the country.

For the purposes of this Agreement and with respect to any federal reimbursement requirements of the U.S. Department of Labor, KPMG shall be determined to be a “contractor” per 2 C.F.R. § 200.331 and not a “subrecipient”.

Our team of leaders and staff led by Dr. James Moore includes a high performing team dedicated to State Labor agencies. Additionally, key team members such Dr. Moore, Dr. Yu, Dr. Collins, and Stephanie Gore have worked inside State Labor agencies and USDOL for years. They will bring West Virginia an inside perspective and provide added value practical solutions.

Team member	Roles and responsibilities
 <p><b>James Moore, Ph.D.</b> <i>Engagement Lead</i></p>	<p><b>Dr. Moore</b> your Lead Engagement Principal will have ultimate accountability and responsibility for the work of the KPMG team, which will include providing oversight to help verify that project deliverables are of high quality and that the team is meeting the needs of this project, verifying that appropriate firm resources are dedicated to this project to complete the scope of work, reviewing, and approving engagement deliverables, and monitoring engagement status.</p> <p>Dr. Moore is an accomplished and results- oriented Labor Economist with a strong record of overseeing and improving federal and state education, social programs, and workforce development programs. Dr. Moore has over 25 years of demonstrated skills in project management, program evaluation, labor economics, education, social program and labor policy, research and survey methodology, analysis of regulations, quantitative research, and data analysis.</p>
 <p><b>Bharat Gorantla</b> <i>Interface Lead</i></p>	<p><b>Bharat</b> serves as the subject matter professional and interface design lead in this engagement. Bharat is an experienced and versatile managing director in KPMG's Data &amp; Analytics group. He is experienced in both product development and R&amp;D as well as business development, consulting, and service delivery to benefits providers, payers, and life sciences clients. His specializations include a mixture of both technical and healthcare leadership along with a solid and extensive foundation for data analytics. Bharat possesses a solid foundation in workforce and UI, and other government benefit programs.</p>
 <p><b>Alice Yu, Ph.D.</b> <i>Project Director</i></p>	<p><b>Dr. Yu</b> will be responsible for serving as the day-to-day primary point of contact and be personally involved in overseeing that the KPMG team executes the work in accordance with KPMG's policies and processes. She will help ensure our approach meets your needs and provide subject matter insight to drive the project forward and address any challenges that may emerge during the duration of the project.</p> <p>Dr. Yu is a labor economist and a subject matter specialist in unemployment insurance, workforce development, and social equity. Her specialist is to use data and quantitative modeling to guide decisions. She has supported multiple state government agencies to address issues, including unemployment compensation, program assessment, policy evaluation (rules, laws, UI program letters, etc.), development of executive dashboards, economic and labor marketing forecasting, and preparation of surveys.</p>



Team member	Roles and responsibilities
 <p><b>Stephanie Gore</b> <i>CX/Communications Manager</i></p>	<p><b>Stephanie</b>, your CX/Communication Manager will oversee the coordination of implementation communications efforts within the engagement. Stephanie produces result-oriented, modernized solutions for leaders who are committed to transforming their organizations.</p> <p>As a skilled transformation leader, Prosci® certified change strategist and program manager, she has led large-scale, mission-critical projects (organization sizes from 500 - 25,000 people) in government and commercial sectors. She led efforts to help three states inventory and assess compliance with UC rules, laws and regulations issued by Federal and State. Stephanie possesses and brings a wide range of transformation skills to WorkForce WV, including organizational development, innovative communications strategies, change adoption, target operating model planning and implementation.</p>
 <p><b>Andrew Komendantov</b> <i>Senior Data Analyst</i></p>	<p><b>Andrew</b> is an economist in KPMG's Economic Services team with experience in econometric and data analysis, economic impact analysis, and cost-benefit analysis, including monetizing user and non-user benefits. Prior to joining KPMG, Andrew worked as an economic consultant in the transportation and infrastructure sector for over five years.</p>
 <p><b>John Collins, Ph.D.</b> <i>Senior UI Data Analyst</i></p>	<p><b>Dr. Collins</b> is a Manager in KPMG's Economic Services practice, having joined the firm in January 2019. He has over 9 years of experience working with government clients to improve the efficiency of their business processes and provide insight into program outcomes through use of innovative statistical techniques. In these federal engagements he has taken part in the development of new measurement instruments to improve the accuracy and consistency of agency decisions, as well as analytical tools to automate or facilitate the conduct of business processes. John's representative clients include state labor agencies in PA, MA, and FL.</p>
 <p><b>Talmadge Cooper</b> <i>Analyst</i></p>	<p><b>Talmadge</b> has experience integrating the change principles for specific projects within chain and manufacturing companies. Also, I have gained experience working with internal clients on change impacts revolved around strategic company initiatives such as CPA, Pricing, and MBET.</p>
 <p><b>Tracy Newsome</b> <i>Analyst</i></p>	<p><b>Tracy</b> is a Change Management professional with experience in assisting State Government and Healthcare projects prepare for and implement change by addressing the people, process, organizational structure, systems, and technology aspects of change.</p> <p>Leveraging experiences, she has assisted organizations to help ensure change is aligned with business strategy, provide strategy for successful adoption, and drive transformation success for projects and departments.</p>



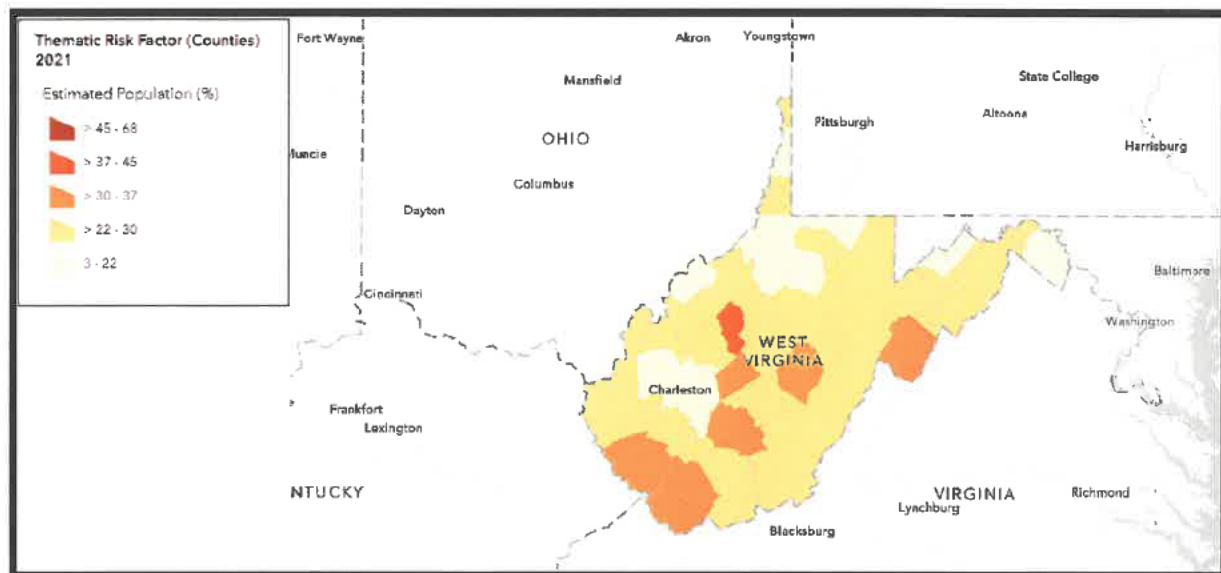
# Technical approach

## 4.1 Background and understanding

### Overview of West Virginia labor market and demographic heterogeneity

West Virginia is the heart of Appalachia, and like the other 12 states<sup>1</sup> that comprise the Appalachian region, West Virginia has a unique labor market owing to the rural nature of many of its communities. These communities are often geographically isolated, have declining populations, and differ in various ways from urban and semi-urban areas. While the unemployment rate in West Virginia is currently lower than the national average, at 3.4%, this figure masks a labor force participation rate below the national average. As of July 2023, labor force participation was 54.7% in West Virginia and 62.6% nationwide. Due to changing economic conditions, low labor force participation can indicate structural weaknesses in labor markets.

Declines in labor force participation rates can also result from aging populations, a high rate of disability in local communities, and more general trends in demographics. People naturally leave the workforce as they age, and the share of West Virginia's population over 65 increased by 4.6% between 2010 and 2021. Disabilities prevent people from entering the labor force. West Virginia has the highest disability rate of any state in Appalachia, and this figure coincides with a high poverty rate. A useful tool for assessing a community's overall economic condition is provided by the United States Census 2021 Community Resilience Estimates for Equity. This report contains estimates of a Thematic Risk Factor (TRF) that combines information on income-to-poverty ratio, single or caregiver households, crowding, communication barriers, unemployed persons, disabilities, health insurance coverage, and health conditions to create a single risk index. As shown in the map below, many counties in West Virginia have more than 22% of their population at risk, according to the TRF. This indicates a confluence of demographic factors associated with difficult economic situations and labor market conditions.



<sup>1</sup> <https://www.arc.gov/about-the-appalachian-region/#:~:text=The%20Region%27s%2026.3%20million%20residents,and%20all%20of%20West%20Virginia.>



Despite general trends in the statewide labor market and overall demographics, West Virginia exhibits significant heterogeneity in labor markets and workforce populations at a local level. Some counties in the state, often urban counties, have labor market indicators that consistently beat national averages. The gaps in labor outcomes between counties can be extreme; for instance, over the period 2017-2021, there was a gap of roughly 44% in the labor force participation rate in West Virginia's highest (Monongalia County at 79.7%) and lowest (McDowell County at 35.4%) performing counties. These disparities have been exacerbated in the past three years with volatility in labor markets resulting from the pandemic. Such extremes in local labor markets reinforce the importance of targeted outreach for rural and marginalized communities.

Just as labor markets vary across the state, so do demographics. Major differences are, again, primarily across the rural-urban divide. While most people in West Virginia have a high school diploma, the most significant numbers of holders of postsecondary degrees are concentrated around Charleston and Morgantown. Similar trends characterize broadband internet subscriptions and access to computer devices in households. Variations in demographics pose an obvious challenge for government agencies in serving their customers. It may not be reasonable to assume that households in isolated, rural areas can be reached by the same methods as those in urban communities. These same households may be historically marginalized as well.

Disparities in West Virginia's labor markets suggest that the state could benefit from improved collection and analysis of demographic data, as well as outreach and communication with targeted unemployment claimants to achieve more equitable access to unemployment benefits.

## We understand your needs

The U.S. Department of Labor (DOL) issued UIPL 23-21 on August 17, 2021, to provide states with funding to promote equitable access to unemployment insurance (UI) programs.

States can use the funding for a variety of activities, including:

- **Eliminating administrative barriers to benefit application:** States can use funding to simplify the UI application process, provide more outreach and education to potential claimants, and waive certain eligibility requirements.
- **Reducing state workload backlogs:** States can use funding to hire additional staff, purchase new technology, and implement new processes to reduce the backlog of UI claims.
- **Improving the timeliness of UI payments to eligible individuals:** States can use funding to expedite the processing of UI claims and payments, provide direct deposit options for claimants, and issue payments more frequently.
- **Fostering equity in fraud prevention, detection, and recovery activities:** States can use funding to improve their fraud prevention and detection systems, foster that fraud investigations are conducted fairly and equitably, and recover benefits that have been paid out as a result of fraud.

The funds made available through UIPL 23-21 are intended to help states improve the administration of their UI programs and help ensure that all eligible individuals have timely access to benefits. The DOL

encourages states to develop innovative and creative ways to use the funding to address the challenges they face in administering their UI programs.

The funding also allows states to implement projects that seek to remove barriers related to race, age, ethnicity, language proficiency, disability status, geographic location or other systemic issues and help enable those in need to access unemployment insurance benefits.

In August 2022, USDOL awarded Workforce WV funding to focus on advancing the expansion of the collection of demographic information to enhance the equitable accessibility of WorkForce WV's current Unemployment program. This expansion and enhancement will be carried out through the execution of three (3) distinct projects:

1. **Enhancing claimant communication and outreach:** KPMG understands that Workforce WV plans to use the funding to develop plain language communication materials for UC claimants, such as brochures, FAQs, and videos. These materials would be written in clear and concise language that is easy for all claimants to understand, regardless of their educational level or language proficiency.
2. **Broadening and refining the process of demographic data collection and training staff on data collection:** KPMG understands that Workforce WV plans to use funding to train staff on collecting demographic data from UC claimants sensitively and respectfully. This training would help staff understand the importance of collecting complete and accurate demographic data and how to address any concerns that claimants may have about answering these questions.
3. **Evaluating the delivery of benefits and gauging claimant experience:** KPMG understands that Workforce WV plans to use the funding to track and assess the key performance indicators of equity in its UC program. This would involve collecting data on the number of UC claimants from different demographic groups, the length of time it takes to receive benefits, and the success rate of claimants in finding new jobs. This data would be used to identify areas where the UC program is not equitable and to develop strategies to improve equity.

KPMG understands that Workforce WV's primary goal for using the funding is to address demographic data completeness in its UC program and help foster that all claimants have an equal opportunity to receive timely benefits.

## 4.2 Task approach

At KPMG, we are committed to meeting and, in some areas, exceeding the mandatory requirements set forth by Workforce WV. We understand the pivotal role of demographic insights in delivering timely benefits and improving the claimants' experience. This realization is echoed throughout our approach to investing deeply in stakeholders' insights, helping ensure we reach and resonate with a representative segment focusing on the traditionally underserved.

### Task 1: Expanding and improving collection of demographic data

Recognizing the potential concerns and apprehensions surrounding data collection, we have deep experience constructing robust **Communication Strategies**. Our strategy will emphasize the importance of demographic data collection while also laying out clear, transparent protocols on data usage, ensuring claimants are well-informed and confident about the confidentiality and integrity of their information.

Our efforts will continue beyond the claimants. We will be equally vested in providing supports to Workforce WV's staff, the very heard of the agency to enhance their understanding of the initiative, their



skills, and more importantly the quality of claim services. By organizing targeted training sessions, we aim to equip **WorkForce WV Staff** with industry best data collection practices, helping them understand its importance, approach, and how to address potential concerns.

However, innovation at KPMG is not just about people; it is about systems, too. To this end, we are primed to **Modify the WorkForce WV's legacy mainframe Interface (the Automated Payment System)**, integrating it with advanced features that simplify data entry, enhance user experience, and offer multiple touchpoints for claimants to input or update their demographic data seamlessly.

We understand WorkForce WV is committed to an inclusive approach that extends outreach to diverse communities, especially those historically underserved. By addressing the hurdles faced in the data collection process and bridging the "digital divide," the state aims to offer tailored assistance to its claimants. We believe the essential questions are:

- What demographic characteristics do unemployment claimants exhibit?
- How do these demographics align with county-wide data?
- Are certain demographic groups disproportionately represented in UI applications?

KPMG will apply a multi-pronged approach that will offer a solution to WorkForce WV that will focus on the rural and marginalized populations. We recognize the evolving challenges of demographic data collection—transitioning from accuracy issues to completeness concerns. Several challenges persist:

- Voluntary data submission
- Changing self-identification methods
- Ambiguity about data's importance
- Fear regarding data misuse

To address this, our approach will apply the following steps:

## **Step 1: Data Identification and Prioritization**

### **Data identification**

Using various data sources, we will craft a comprehensive understanding of the unserved and underserved communities. KPMG will tap into the following data sources:

- **KPMG Signals Utility:** A dynamic platform that captures data from 250+ sources, transforming them into actionable insights. This includes data ranging from unemployment figures to real estate trends.
- **KPMG's Social Index Data Tool:** Processes data to pinpoint economically and socially challenged locations, helping ensure our outreach and communication efforts are efficiently directed.
- **Census Bureau Data:** This offers a panoramic view of population features, with data encompassing demographics, employment, education, health, transportation, and more.
- **Broadband Adoption Data:** The Digital Equity Act Population Viewer highlights populations categorized under the Digital Equity Act of 2021, highlighting broadband adoption and other digital nuances.

- **Business Employment Dynamics (BED):** Providing job gain and loss data since 2019 at county levels.
- **Quarterly Workforce Indicators (QWI):** Offering economic metrics based on firm specifics and worker demographics.
- **Longitudinal Employer-Household Dynamics (LEHD):** A resource-rich database detailing the labor market's fluidity.

### **Stakeholder Engagement**

Interviews and conduct focus groups with WorkForce WV staff, claimants, and mutually agreed upon stakeholders within rural and marginalized communities. These engagements will offer insights into the unique challenges faced by these communities and will guide the development of a tailored data collection strategy.

### **Conduct Research**

We develop an understanding of specific apprehensions, historical contexts, and barriers these underserved communities face. By identifying resonant communication mediums, we aim to identify the appropriate means of communication that resonate with them.

### **Apply Advanced Analytics**

Our team will deploy data analytics to pinpoint areas deficient in data collection. We will discern trends and areas necessitating dedicated interventions by leveraging industry leading analytics.

**Deliverable:** KPMG will provide a data file of the newly collected data and a comprehensive "Equitable Data Collection and Outreach Report" detailing the methodologies employed, insights derived from stakeholder engagements, results from the research conducted, technological implementations, and actionable recommendations to enhance demographic data completeness, primarily focusing on rural and marginalized communities. This document will serve as a roadmap for WorkForce WV to replicate the data collection for future endeavors.

## **Step 2. Communication plan and strategy development**

Collecting comprehensive demographic data is a cornerstone in building inclusive programs, ensuring equitable access to benefits, and fostering understanding across diverse communities. However, the collection process can raise concerns, particularly in communities that historically feel vulnerable or marginalized; therefore, it is imperative that the communication strategy not only emphasizes the significance of demographic data but also builds trust by addressing apprehensions related to data usage, privacy, and security. KPMG understands that claimants of specific demographic groups may be reluctant to share personal information for many reasons, including fear of discrimination or because they may not identify with the options provided.

Our communications strategy will include:

- The reason the state is collection certain information
- The additional data/categories the state plans to collect
- An explanation of how the information will be used

- Educate claimants and potential UI benefits applicants that there is no discrimination against them based on demographic profiles
- A detailed guidance to respondents on whether responses to questions are mandatory. If they are, whether there are options for “don’t know” and “choose not to answer”

It is important to address privacy protection issues in the communication plan and help ensure the data collected will be stored and used appropriately. Therefore, this communication strategy should specify who has access to the data, how the state helps ensure data access is only limited to those who need it, how is the data used, and how is the data safeguarded. KPMG understands the sensitivities surrounding demographic data collection and the necessity of cultivating trust with communities.

#### **Our approach will also include:**

1. **Craft Clear Messaging:** We will create succinct and transparent messages elucidating the reasons and benefits behind demographic data collection.
2. **Engage with Community Influencers:** By working closely with relevant stakeholders in the community, we aim to amplify the data collection message to help bolster trust.
3. **Multimodal Outreach:** Leveraging diverse channels – from workshops to digital platforms – will help ensure our message reaches a broad audience.

#### **Deliverable:**

KPMG will provide a comprehensive communication strategy document detailing our approach – from messaging blueprints to outreach plans. This document will serve as a roadmap, documenting the importance of collecting demographic data, how it is used, and the extensive measures in place to protect their privacy.

### **Step 3. Staff training on data collection**

An effective and thorough training program helps ensure sustainability of project impact and workflow changes: by focusing on capacity-building, training, and documentation, we help determine that the changes recommended and implemented have longevity and continue to benefit the WorkForce WV after our work has concluded. This sustainability translates into enduring positive effects for claimants, the agency, and program success in the state of WV.

KPMG's approach to providing training and shadowing opportunities for WorkForce WV staff to enhance their understanding of the purpose and processes of demographic data collection expansion, is to empower them to implement these processes independently. Our training program will be conducted through a mix of face-to-face sessions according to the mutually agreed upon project plan, hands-on practical exercises, and online training modules that can be accessed by your staff at any time. We will customize the training program to meet your specific needs and help ensure that your staff is fully equipped with the skills and knowledge required for effective data collection.

The expectation at the end of the training program is for the WorkForce WV staff to have:

- A clear understanding of data collection techniques
- A deeper understanding of data quality standards and data governance
- Improved capacity to monitor and evaluate the data collection processes

Based upon prior experience in similar projects, KPMG recommends the following steps:

- **Assessment of current knowledge:** Assess the current skills and knowledge of the WorkForce WV staff about demographic data collection processes to determine the level and type of training needed
- **Development of customized training materials:** Based on the assessment, develop a range of customized training materials that are tailored to the needs and learning styles of the staff. These materials can include forms of presentations, case studies, and hands-on exercises to promote understanding and applying leading practices. Key elements in staff training will cover:
  - Overview of data collection and its importance
  - Types of data collection methods
  - Gathering and analyzing qualitative data
  - Data quality standards
  - Monitoring and evaluating data collection processes
- **Facilitation of interactive virtual training sessions:** Facilitate up to two virtual interactive training sessions for the WorkForce WV staff, helping to ensure the training is engaging, interactive, and relevant to the organization's needs. These sessions allow the staff to ask questions, share their experiences, and apply what they have learned in a practical context.
- **Virtual Shadowing opportunities:** Offer up to five shadowing opportunities for the staff to observe experienced data analysts as they perform data collection and analysis processes. This will provide the staff with practical, hands-on experience and help to reinforce the concepts learned in the training sessions.

Ongoing Support and Feedback. Recognizing that learning is a continuous process, over the period of performance KPMG will provide ongoing support and feedback to department staff as they apply their newly acquired data collection and analysis skills in their roles. This support will include:

- **Technical Assistance:** KPMG's professionals will be available to answer questions, troubleshoot issues, and provide guidance to department staff as they implement data analysis processes independently.
- **Periodic Check-ins:** KPMG will provide weekly check-ins with WorkForce WV leadership to discuss their progress, address any challenges they may face, and offer additional training or support as mutually agreed to between KPMG and WorkForce WV.
- **Refresher Training:** KPMG will offer up to two refresher training sessions and updates on new data analysis techniques, tools, and leading practices to help department staff stays current and proficient in their skills.

By providing thorough training, shadowing opportunities, and ongoing support during the contract performance period, KPMG aims to equip WorkForce WV staff with the knowledge and skills needed to effectively implement the data collection processes.



KPMG will provide a training document that highlights the purpose of collecting additional demographic data, how the data will be stored and used, data collection methods, data quality and validation process, and other relevant knowledge.

**Porter's Generic Strategies**

**Challengers**      **Contenders**      **Strong Performers**      **Leaders**

**Stronger current offering**

**Weaker current offering**

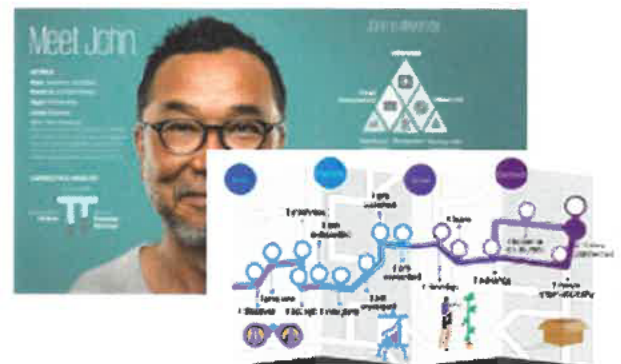
**Weaker strategy**      **Stronger strategy**

**Market presence**

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The KPMG Team has carefully considered overall

KPMG's proposed approach leverages our firmwide technical experience in design and leading practices in customer experience (CX), along with our deep industry and technical knowledge, to deliver a leading user experience for the Department's external customer base and internal staff focused on achieving DBPRs long-term transformation goals. KPMG is fully equipped to support WorkForce WV in its Customer Experience Management (CXM) design given KPMG's capability in customer experience, user experience design, change management and technology implementations.



## Proposal to serve WorkForce West Virginia



KPMG knows that leveraging human-centered design (HCD) to build and deliver technology lies at the heart of business strategy. To build end-user interfaces, we bring a cross-disciplinary group of designers, technologists, subject matter professionals, agile product managers, digital architects, and developers to bring user-facing products to life through:

**Experience strategy and design:** A human-centric approach that values empathy and examines user values, behaviors, and motivations with the goal of providing the data and analysis needed to define features and functions that will transform future experiences. Experience design builds upon the outcomes of strategy to visually explore features and functionality that is delightful, meaningful, and engages and empowers users.

**Design thinking and prototyping:** A modern problem-solving framework that engages users, designers, and stakeholders and promotes co-creation, diversity of thought, visual expression and results in a shared vision and sense of ownership. Validation of those design through iterative processes with WorkForce WV.

### **End-user interface example: Morehouse School of Medicine**

KPMG and MSM developed a platform that gathers critical resources and data on COVID-19 to connect families to culturally and linguistically appropriate information and services.

As the partner for NCRN KPMG delivered the following:

- Definition of customer journeys, use cases and scenarios for target population and community-based organizations, determined by ongoing requirement gathering sessions and agile product development.
- Development and implementation of the NCRN call center, mobile and web applications on Salesforce Experience Cloud, Marketing Cloud, Mobile Publisher, and Service Cloud with an integration to KPMG's Signals Repository. The MSM NCRN mobile app is available for download in Android and iOS app stores.
- Development and deployment of a state-of-the-art communication and engagement strategy to ensure maximum value for the targeted population.

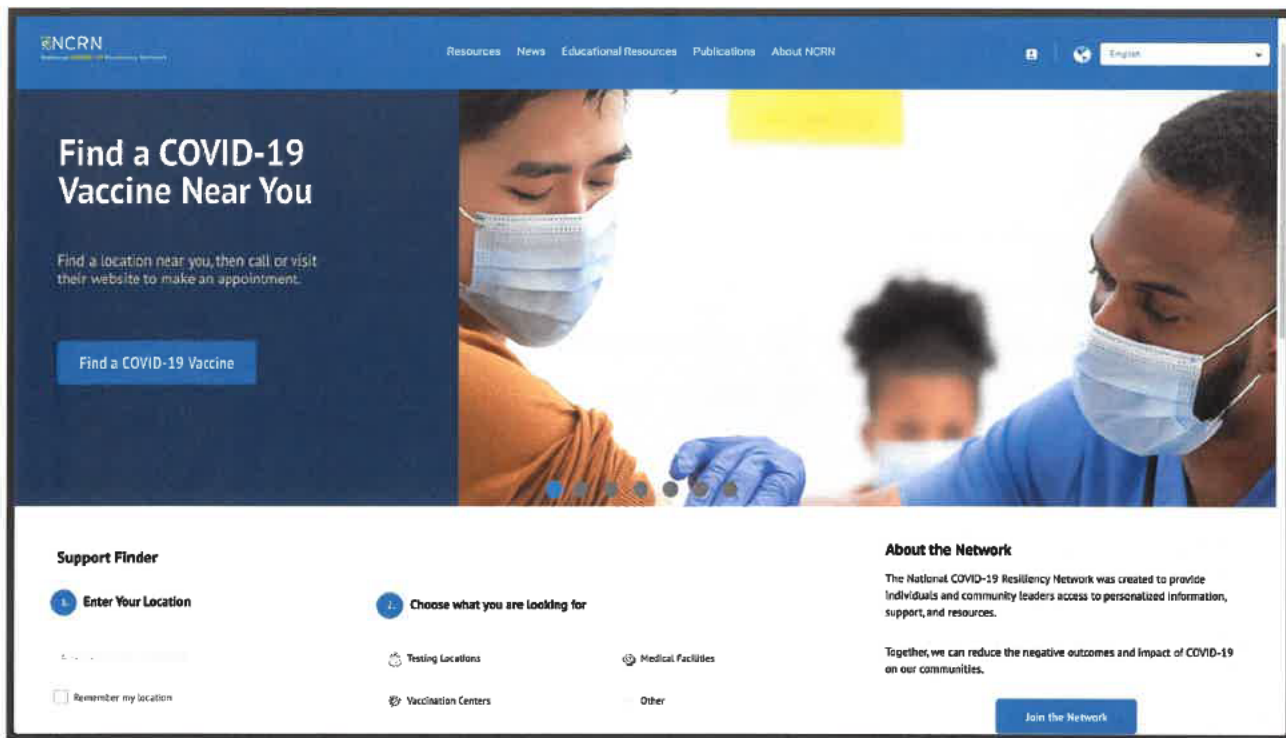


Figure 3: NCRN User Experience

Figure 4: Mobile App for iOS and Android

## Our approach to designing engaging user interfaces

Data and analytics user interfaces tell a compelling, powerful story to the user. With that in mind, designing data visuals brings a significant responsibility to evaluate that the data presented is telling a clear, comprehensive, and intentional story. Further, data visualizations need to engage the user without overwhelming or overcomplicating, allowing the user to dive deeper if needed. KPMG's Digital Design team works together with data and analytics professionals to design compelling visuals using this the following but not limited approach:



- 1 **Understand the Users.** Define the user groups who will be accessing the visuals. What is their level of literacy? What additional context will be needed?
- 2 **Become familiar with the data.** Understand the limitations and opportunities of the data.
- 3 **Define and align on goals.** What are you designing the interfaces to perform? What types of decisions will users make? What insights will they glean?
- 4 **Establish a visual hierarchy.** How frequently is the user engaging with the data? What does the user need to see/understand in the first 3 seconds? 30 seconds? 3 minutes?
- 5 **Define the critical data path.** How do we help enable the desired goals and insights with fewer visualizations? What analytics or visualizations may be superfluous? What is nice to have?
- 6 **Match the data to the interface screens.** With the users, goals, hierarchy, and path defined, select the visualizations that help enable the story, e.g., hierarchical, temporal, geospatial, then design the first iteration.
- 7 **Validate for accessibility and usability.** Leveraging an iterative process, engage with the department to understand how they can evaluate their users on their ability to follow the desired critical paths, locate the desired insights. Confirm that the visuals meet any required accessibility standards.

All states have to accept UC applications via multiple modes including in person, mail, telephone, and online. At the end of our approach, KPMG proposes to employ the following steps with no more than 10 recommendations to the interface:

- **Include hyperlinks** to text, explaining the importance of collecting demographic data and how the information will be used in online forms/applications
- Use **Behavioral Science research-tested messages** that have been shown to resonate with users and encourage data submission
- **Increase opportunities** for claimants to provide the data for collection if data is missing

- Prompt near the end of the application
- Prompt when the claimants logs into their account (e.g., when they log in to certify)
- Send special email reminder to complete this information a short time after initial claims or during certification
- Develop process to collect the data

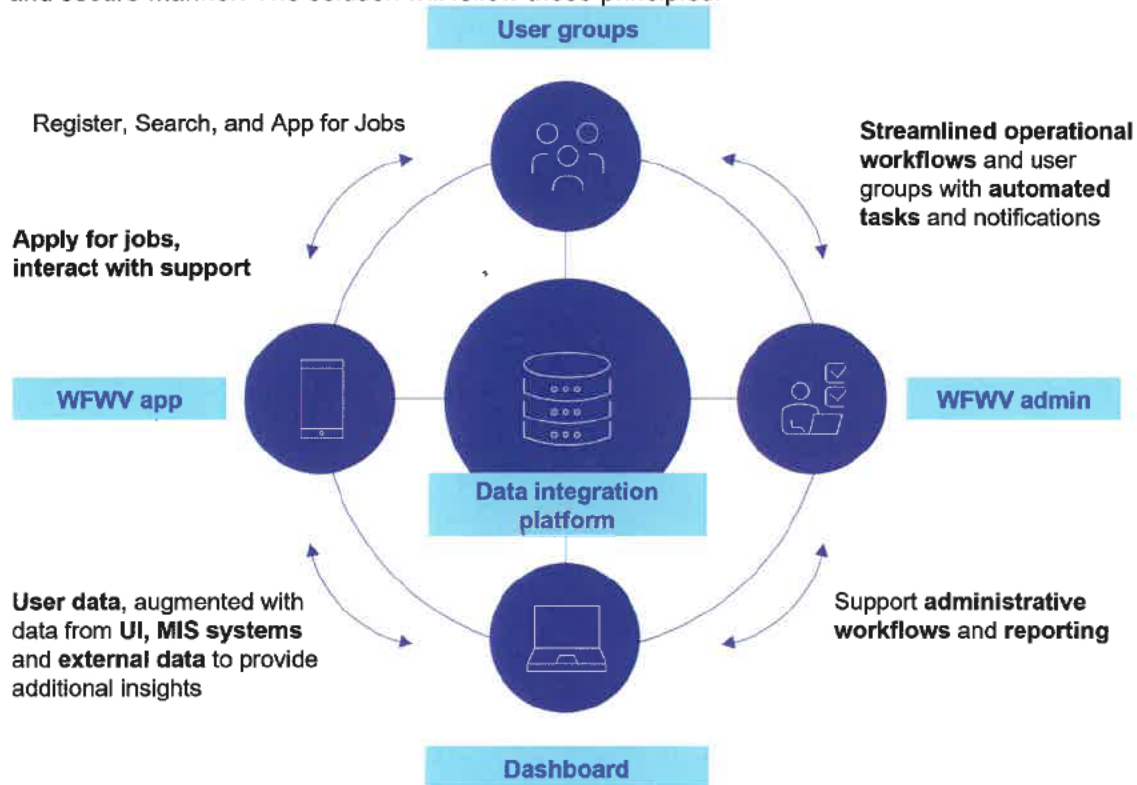
Deliverable(s)	Description
Project Workplan for Task 1, 2, and 3	The first deliverable of the engagement is Project Workplan. KPMG and Workforce WV will work closely to finalize scope and deliverables.
Communication strategy on data collection	This document will lay out the communications and outreach plans to educate the public and other various stakeholders on the project goal, data privacy, and data components to be collected
Redesigned interface to collect data	A modified interface design on the current system to only include the inclusion of expanding to allow for demographic data collection within the existing Mainframe system. These designs will be provided to the department for further approvals and implementation by them.

### Optional Service – Mobile App to enhance equitable access to UI benefits (*this optional service is not included in our pricing*)

A modern government understands its citizens' needs and preferences and can offer the seamless digital experience consumers expect in all aspects of their lives. As such, as a need identified by WFWV which is to improve the citizen experience and in turn have better means of reporting/validating the citizen engagement in the job market. As such, we recommend that WFWV address this need via a custom app that would allow for citizens to register, search, and apply for jobs.

- Be alerted when new jobs are available in the market
- Provide on-demand support on both the app and the content
- Be able to track citizen's user experience and behaviour on the app
- Integrate with internal job boards for job listings
- Integrate with UI and MIS systems for back-office validation
- Access tracking capabilities for the purpose of verifying UI weekly job search requirements
- Building a compatible score of the citizen to the job identified or job applied

KPMG has built several apps for clients and as such bring a wealth of learnings, and leading practices. KPMG is recommending a simplified and environment agnostic app that will meet WFWV's needs in a safe and secure manner. The solution will follow these principles:



- **Adaptability & Expandability:** Our custom app development methodology utilizes modern delivery techniques to deploy a microservices-based product that can be continuously enhanced and modified to meet future demands. We do not view our app as only a Workforce app,” but an expandable platform to meet the current needs of today and evolve to meet future user experience and engagement needs for the WFWV.
- **Ease of Implementation & Utility:** The custom app we would develop for WFWV would be a mobile experience delivered via progressive web app that can be accessible from any device (i.e., no app store download required). The user interface would be carefully designed and developed to meet the specific usability needs and expectations of the stated user groups. However, it is hard to predict the accessibility of other systems and workflows to integrate with our custom app, therefore we recommend beginning with a rapid ‘Discovery, design, and strategy’ phase to gain an in-depth understanding of the integration points and data sources.
- **Host anywhere:** The solution can easily be deployed and hosted in any environment WFWV wants. The back end would be hosted on the WFWV environment and designed to integrate with other systems and workflows currently utilized by the WFWV. It can be in the cloud, or at the WFWV environment.
- **Customizable Analytics:** The solution will allow to be flexible and customizable to the required analytics as defined by WFWV
- **User Experience:** The solution will incorporate leading practices on user experience.
- **Robust Dashboard:** There will be a back-office capability to view standardized dashboards as defined with WFWV on performance metrics, and other leading indicators.



## Task 2: Improve claimant communications and outreach

At KPMG, we understand the uniqueness of the State's demographics and recognize the pressing need to forge impactful bridges with individuals from rural and marginalized communities. Our approach to supporting Workforce WV hinges on the principle that effective communication is not about a one-size-fits-all approach but precision-targeted outreach campaigns. The campaigns we developed will be designed to resonate with the unique sensibilities of every claimant segment. By employing our blend of innovative technologies, data-driven insights, and human-centric design principles, we are committed to enhancing the claimant experience. Our collaborations with equity programs will be tailored, responsive, and adaptive, helping ensure that every claimant feels seen, heard, and understood. In collaboration with WorkForce WV, we will create a communication ecosystem where claimant communication becomes a beacon of clarity, empathy, and transparency."

KPMG will develop an outreach campaign tailored to support data collection and equity service delivery that will transcend the limitations of a "one-size-fits-all" approach. With an emphasis on a citizen-centric ethos, KPMG aims to transform the claimant experience in collaboration with WorkForce WV.

### KPMG's Holistic Approach Comprises of the following:

1. **Data Utilization:** KPMG will harness administrative and public data repositories to discern population disparities, contrasting them against UC claimants. Leveraging robust datasets like the Household Pulse Survey and the Response Outreach Area Mapper (ROAM), we are committed to gaining a nuanced understanding of each demographic segment and its distinct needs. KPMG will also merge administrative datasets with publicly available data sources to create a holistic view of the State's demographics and current UC claimants.
2. **Customized Outreach Techniques:** Leveraging machine learning (such as decision trees and other predictive analytics) and data analytics, KPMG will identify population gaps, especially where UC claimants are underrepresented. These insights will be instrumental in mapping out targeted outreach areas. Based on the data insights, KPMG will segment the potential claimants into well-defined groups. These groups will consider factors like geography (rural vs. urban), socioeconomic status, language preference, and other demographic nuances. For each identified segment, KPMG will craft a bespoke outreach strategy. This confirms that our approach resonates with each group's specific needs, preferences, and challenges.
3. **Diversified Outreach Campaigns:** KPMG will collaborate with Workforce WV to:
  - a. **Conduct Local Events:** Recognizing the importance of personal connections, KPMG will support localized events in rural and urban settings. These events will act as information hubs, addressing concerns and guiding potential claimants through the process.
  - b. **Simplify Online Applications:** KPMG will provide Workforce WV with templates to design an online application and sample FAQ sections.
  - c. **Create Mobile and Social Media Messaging:** KPMG will develop scripts for up to 20 text message alerts and 20 social media posts to send reminders application status updates and provide easy access to resources.
4. **Sub-population Specific Campaigns:** Given the heterogeneous needs of each sub-group, our campaigns will be meticulously designed to address them. Be it claimants grappling with language barriers, transport issues, or physical disabilities, our campaigns will resonate, helping ensure they are well-informed and have clear pathways to services.

5. **Communication Model:** The pandemic underscored the digital chasm and the imperative for adept communication. Drawing from our experience, KPMG will help guide WorkForce WV in sculpting a tailored, populace-centric communication narrative. This will not be a monolithic blueprint; it will deftly weave in data to empathetically connect with, aid, and uplift underrepresented groups, dismantling entrenched access barriers.
6. **Equity Outreach:** Rooted in our commitment to equity, KPMG's outreach vision aspires to touch the lives of targeted population slices like those confronting language nuances, mobility hurdles, or disabilities. By capitalizing on local data pools and shaping priorities, we envision a landscape where these cohorts are empowered with knowledge and facilitated access to services. The guiding lights for this outreach will be identifying the claimants, tailoring the services, and strategizing the delivery.
7. **Elevating the Claimant Experience:** Moving beyond stark numbers, KPMG places paramount importance on the quality of claimant interactions. Our metrics will weave a narrative around service excellence, alacrity in claims processing, and overarching claimant delight. By pioneering advanced communication endeavors, we aim to refine processes and amplify the outreach resonance.

## Communications and Outreach Framework

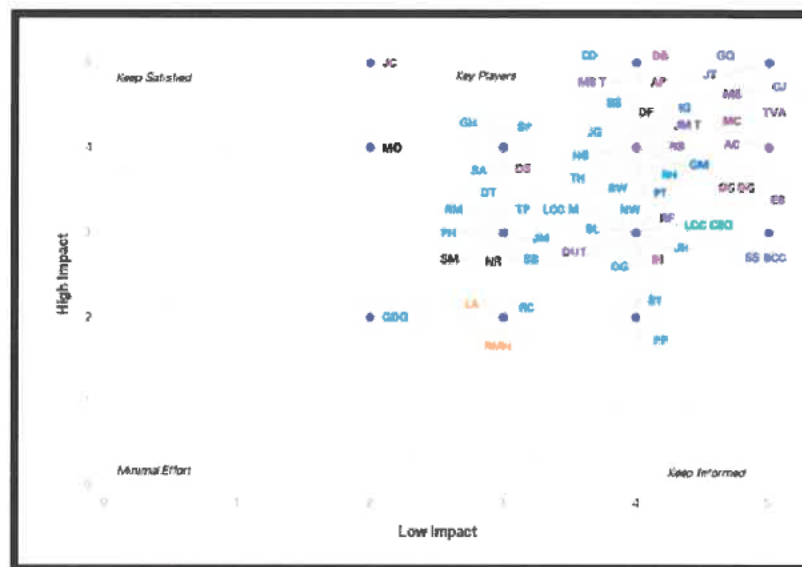
KPMG has placed significant value and investment in helping public and private sector entities better manage organizational and operational issues. To this end, KPMG's national Transformation Delivery practice consists of professionals dedicated to helping organizations deliver on their transformation goals by building stakeholder awareness through the execution and delivery of strategic communication activities. Our phased Communications and Outreach Framework focuses on five key elements that put stakeholders at the heart of the strategy development to ensure we begin engaging with stakeholders as early as possible, understand stakeholder expectations, facilitate awareness of the modernized system, and deliver the right message, at the right time, through the right channel.

Integrated Communication and Outreach Stages				
Make it Clear	Make it Known	Make it Real	Make it Happen	Make it Stick
Communication Objectives				
Develop communications and engagement strategy	Build early awareness, create excitement and build buzz	Enable employees and key stakeholders to envision what the change looks like	Prepare all employees, key stakeholders, and target audience groups for the system transition	Celebrate go-live, provide ongoing tips and tricks, enable feedback channels, remind of future releases
Key Considerations				
<ul style="list-style-type: none"> <li>✓ Identify target audience</li> <li>✓ Map target audience</li> <li>✓ Prioritize target audience</li> <li>✓ Identify existing communication channels</li> <li>✓ Define governance roles and processes</li> <li>✓ Begin to plan audience-specific communications</li> </ul>	<ul style="list-style-type: none"> <li>✓ Develop outreach campaign activities</li> <li>✓ Develop public relations material</li> <li>✓ Equip identified stakeholders with talking points to share</li> </ul>	<ul style="list-style-type: none"> <li>✓ Deploy outreach campaign activities</li> <li>✓ Deploy public relations material</li> </ul>	<ul style="list-style-type: none"> <li>✓ Continue to conduct outreach campaign activities</li> <li>✓ Continue to cascade public relations material</li> <li>✓ Track and measure outreach campaign activities and public relations material</li> </ul>	<ul style="list-style-type: none"> <li>✓ Continue to conduct outreach campaign activities</li> <li>✓ Continue to cascade public relations material</li> <li>✓ Track and measure outreach campaign activities and public relations material</li> </ul>

## Our approach to identifying all target audiences

The key to developing effective stakeholder awareness and engagement is knowing how to reach the target audience when and where they are most receptive to receiving information and then shaping messages in a way that appeals to them. In order to achieve this, we need to understand who will be most impacted by the modernized communications project, their current awareness, attitudes, and sentiment towards the project, and whom they are influenced by, before we can seek to influence them. To do this quickly, we will use our knowledge of the stakeholder environment and conduct a Target Audience Analysis to understand who the likely stakeholders are, and any insights into the stakeholders' perceptions and sentiments towards the project.

Once key stakeholders are identified, we will work with your team to validate all audience groups (internal and external) and map stakeholders based on the level of impact (from low impact to high) to one of four quadrants, which will then be directly linked to a recommended communications and outreach campaign that identifies varying information needs and outlines where, how, and when we should deploy our efforts to maximize results.



Quadrant	Placement	Outreach approach
<b>Key players</b>	High influence/high interest	These stakeholders will be prioritized for in-depth one-on-one consultation and engagement.
<b>Keep satisfied</b>	High influence/low interest	Remain aware of potential issues/impacts which may increase interest levels and respond as necessary.
<b>Keep informed</b>	Low influence/high interest	Provide a forum for sharing opinions and views.
<b>Minimal effort</b>	Low influence/low interest	Monitor and respond as necessary.

### Our high-level communications and outreach strategy:

- **Engagement:** We will draw together the key insights and analysis to develop a concise strategy that outlines prioritized target audiences, engagement approaches, and key communication messages and channels. This will be used to inform our subsequent outreach activities, with the view to updating the strategy once we have the benefit of actually conducting some initial engagement and understanding, rather than predicting stakeholder attitudes and concerns and what messages will likely resonate with them.
- **Develop key messages:** As part of the strategy, we will develop key messages introducing the Modernized System, demonstrating optimized features and user benefits.
- **Channels identification:** The strategy will also identify appropriate communication channels for each target audience group and be used to inform an initial suite of communication materials to test stakeholder reaction and refine our messaging.

### Our approach to developing visually exciting communication materials

Compelling visual communications are an integral part of the communication process that can powerfully convey critical messaging using various channels and connect emotionally with your target audience groups. Our team uses industry-standard Adobe and Microsoft software to create visually exciting artifacts from printed brochures, posters, and press releases to video, scripts, animation, social media and website content, and other digital outputs.

Getting the visualizations right is essential to the successful implementation of your strategy. That is why we propose to develop an initial suite of visualization and communication products, which can be distributed and tested with select stakeholders, and further refined with their feedback. We believe that this approach will help you to start engaging as quickly as possible while minimizing the unintentional risk of adverse sentiment, misunderstanding, or misperception.

We understand that your stakeholders' understanding and sentiment toward the project will evolve over time. It will be necessary to refine the communications materials as we better understand stakeholder perceptions and the various nuances in successfully communicating and influencing stakeholder segments to encourage greater levels of awareness and build support for the project.

- **Outreach materials:** Our designers have the capability to develop online and hard copy materials such as email blasts, e-newsletters, and press releases, as well as infographics and maps that can be used on websites and social media content as required. This initial suite of materials will be deliberately kept to a minimum so that we can test target audience reactions to the visual and messaging components before developing more extensive materials such as artist impressions, display materials, brochures, and videos. This will allow us to revise communications materials and messaging with actual insights from stakeholders so that we can effectively target the benefits of the system, mitigate any concerns, and successfully integrate the broader social and economic benefits with localized and segmented benefits into our messaging and public relations material.



The table below reflects key outcome measures we will capture and help the agency to implement processes and tools to improvements outreach. In our final report, we will support Workforce WV to quantify these measures and summarize these measurable outcomes.

Outcome Measure	Note/Possible Intervention – Claimant Communications
Average reading level of communications material, by language	Helping ensure that materials that are provided online and created for claimants are in plain language and easily accessible by most people. DOL encourages vital documents to be written at an 8th grade reading level.
Percent of communication materials that are 508 compliant	Helping ensure that the website is accessible to claimants with disabilities.
Readability of communication materials	Materials with Flesche Reading Ease Test score reaching 60.
Percent of communication materials that are translated	Confirming that most of WV's population can find vital information in the native language they speak. Interpretation services are required for languages spoken by over 500 residents in the State. According to Workforce WV, seven languages meet this threshold.
Number of languages that vital communication materials are translated to	Confirming that most of WV's population can find vital information in the native language they speak. Interpretation services are required for languages spoken by over 500 residents in the State. According to EPE, the top five languages or language groups spoken by English Language Learners in West Virginia are Spanish, Vietnamese, French, German, and Persian.
Live chat (Chatbot) usage statistics	Implementing a Chatbot on the website to provide live responses to claimants.
Conversion rate (i.e., percent of people who file a claim within X days of accessing site resources, based on either first- or last-touch)	Confirming that the harder-to-reach target groups can apply for benefits and/or appeals as easily as their counterparts in the majority groups.
Track interactions leading up to filing a claim	Confirming that the harder-to-reach target groups can apply for benefits and/or appeals as easily as their counterparts in the majority groups. Comparing the ratio of website hits to resource downloads to claims filed across target groups.
Measuring the usefulness of webpages and communications	Each webpage and/or email could have a quick one questions survey that asks if the information provided is useful (Y/N). Reporting on the percentage of claimants that hit "yes" before exiting the webpage.



Outcome Measure	Note/Possible Intervention – Outreach
Number of attendees at event (sign ups/check ins at event)	In-person events/info sessions organized to disseminate information about the benefits application process and/or to provide support for claimants.
Number of hits on the website (links clicked, document downloads)	Increasing information needed by claimants on the website and through claimant portals to increase self-service.
Email portal – response time	Confirming that emails sent through the portal are responded to in a timely manner. This could include responding with standard language containing FAQs and tracking if further action is needed on average.
Social media responses	Social media is a great way to increase program awareness. Quantitative measures can capture positive comments and likes on a post.
Email portal – resolution rate	Reducing the number of email exchanges before a problem is resolved. This could include the average number of emails exchanged or total time necessary before a problem is resolved.
Email engagement (opens, links clicked etc.)	Sending newsletters to at a certain cadence (weekly/monthly) to disseminate information about the UI programs and to communicate changes. Measures can include: <ul style="list-style-type: none"> <li>• Number of emails sent</li> <li>• Number of emails opened</li> <li>• Number of opt-out (should be low)</li> </ul>
Number of the means of communication with Workforce WV	Evaluate and streamline the ways that claimants can communicate with Workforce WV staff.
Number of social media posts and engagement	Employing social media to communicate with claimants regularly.
Call center volume	Confirming that the communications on the website, emails, and social media are sufficient, so claimants can address issues independently where possible and call center is reserved for issues requiring personalized assistance.
Call center volume by issues	Monitoring the types of issues that are brought up in the call center. Claimants who prefer to speak to a representative about issues for example vs. communications not being clear or sufficient to provide vital information.

By adopting this comprehensive approach, KPMG aims to confirm that potential claimant, irrespective of their background or location, receives timely, relevant, and accessible support. Our ultimate goal is to bridge the information gap, making UC benefits accessible and understandable.

#### **Deliverable:**

KPMG will present a detailed "Outreach and Engagement Strategy Report" at the culmination of the preliminary phase. This document will encapsulate the complete outreach strategy, detailed stakeholder analysis, refined communication plans, equity outreach measures, and an actionable roadmap for the future.

KPMG will also provide a user engagement and data collection effectiveness report that highlights user engagement enhancement, new interface data collection features and effectiveness, and summarize enhanced outcomes due to the improved data collection process.

Please note that the actual deliverables will be submitted based on the mutually agreed upon scope and Project Workplan.

### Task 3: Measure delivery of benefits and claimants experience

KPMG is experienced in leveraging behavioral science to refine service delivery mechanisms. We have extensively applied this experience to address the unique challenges individuals in rural and marginalized communities face. Our experience is rooted in the understanding that behavioral patterns vary across demographics; thus, solutions must be tailored accordingly.

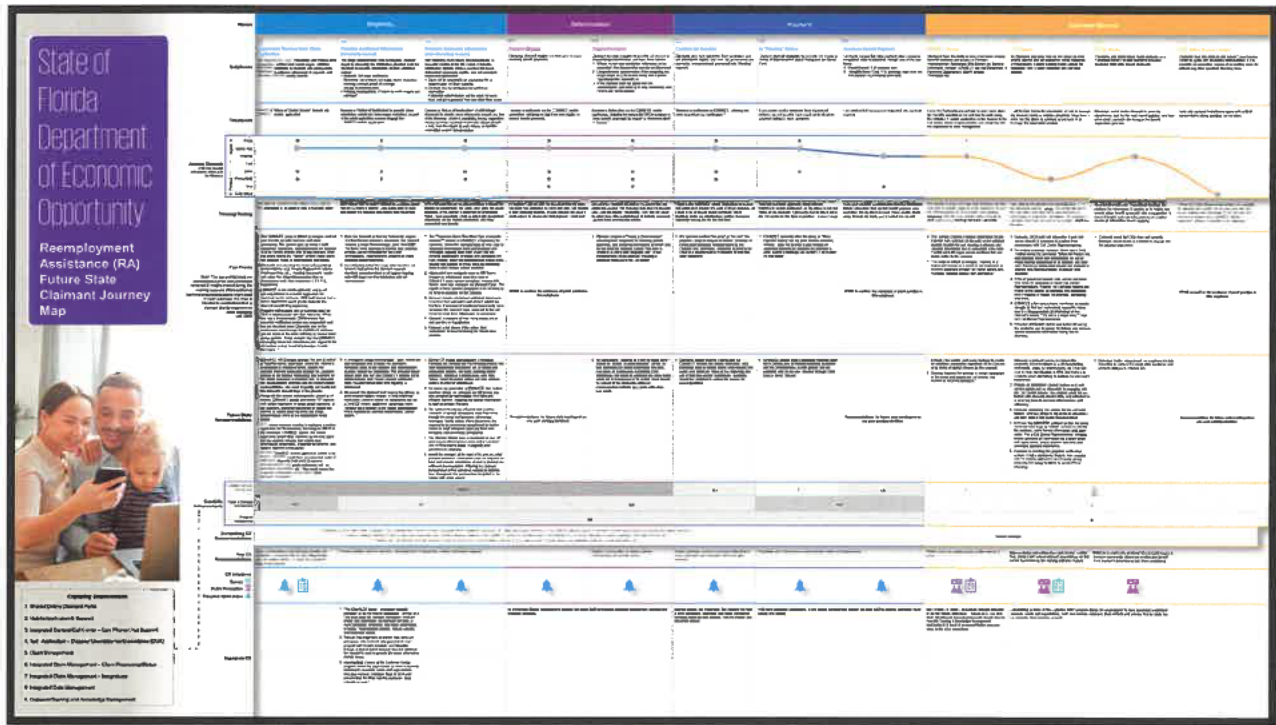
1. **Behavioral Science and its Application:** At the heart of behavioral science lies the comprehension of human behaviors, decisions, and biases. By understanding these behaviors, especially in the context of rural and marginalized communities, KPMG has successfully identified barriers and opportunities in service delivery.

For WorkForce WV, KPMG will deploy a multi-faceted approach. We will start with ethnographic studies and immersive research to gain a genuine understanding of claimants' perceptions of the claims process. This will enhance our reengineering efforts are grounded in the realities and aspirations of the claimants, allowing us to improve their experiences throughout the claim process and their reflections afterward.

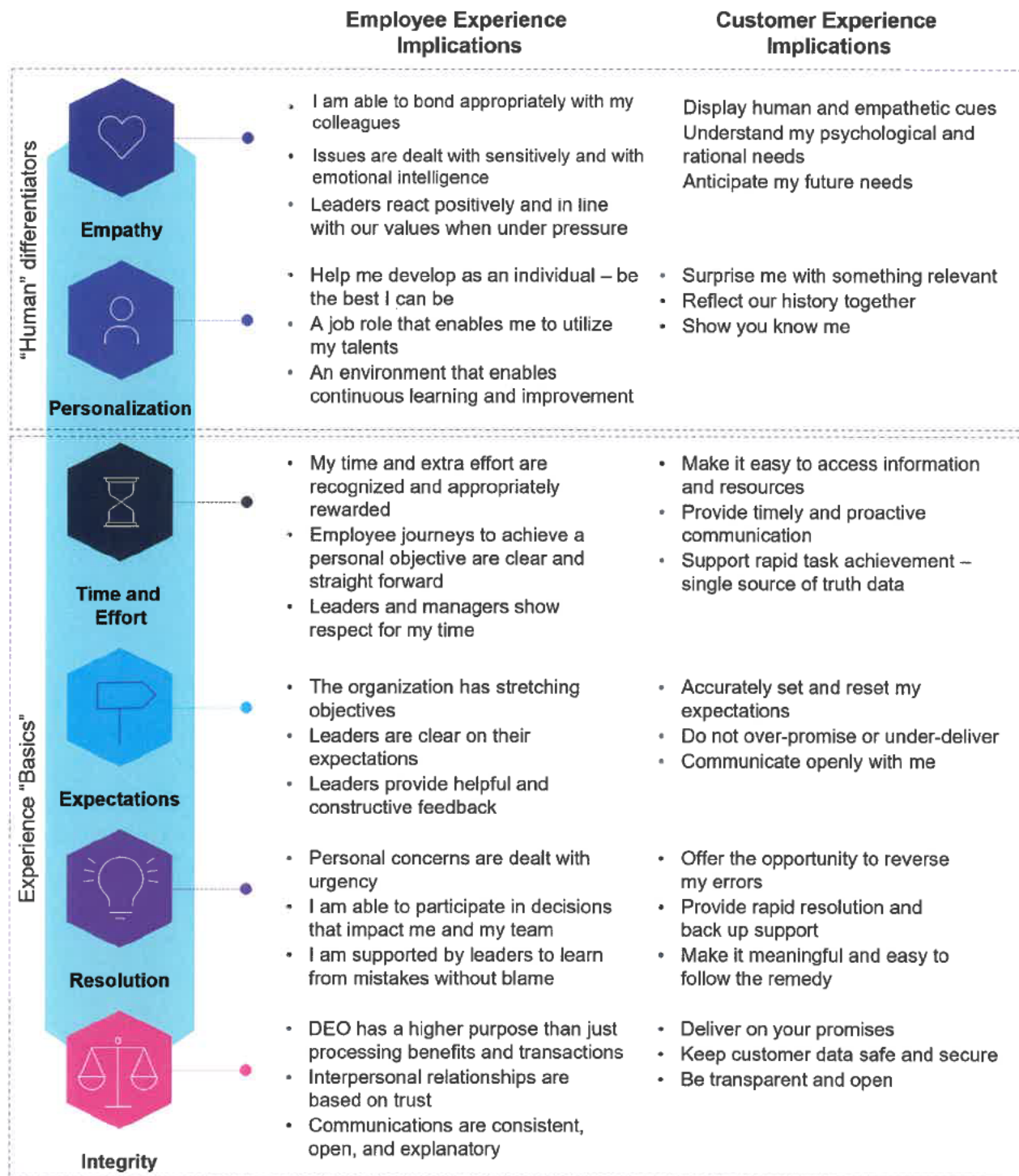
2. **Human-Centered Design in Process Reengineering:** Human-centered design prioritizes the needs, contexts, behaviors, and emotions of the people we serve. Integrating this with our process reengineering for WorkForce WV means creating intuitive, empathetic, and efficient systems. For instance, understanding the apprehensions of a first-time claimant from a marginalized community can lead to the design of a more supportive onboarding process.
3. **Rigorous Research for Enhanced Customer Satisfaction:** KPMG believes that actionable insights arise from comprehensive research. By employing quantitative (like surveys) and qualitative (like in-depth interviews) methodologies, we aim to gauge the current satisfaction levels of claimants. These insights will be instrumental for WorkForce WV to implement strategies determining continuous improvement in claimant satisfaction.
4. **Journey Mapping for UC Programs:** KPMG's previous engagements with UC programs in DC and FL have honed our expertise in customer journey mapping. This tool, a visual representation of a claimant's journey, encompasses every interaction, communication, and service the claimant undergoes. It is a potent instrument to identify pain points, opportunities, and moments of delight. For WorkForce WV, KPMG proposes to craft a detailed customer journey mapping system. This system will provide a holistic view of the service offered to an individual, pinpointing areas where the claimant experience can be elevated.

## Example deliverable of Customer Journey Mapping

A customer journey map is a visual representation of the claimant's journey. It helps to tell the story of the claimant's end-to-end experience working with the agency through the life of a claim from their perspective. It differs from internal process and operational documents. The goal is to refocus internal processes to bridge the gap to improve the claimant's overall journey. Below is a representative example of a journey map.



## Six pillars of customer experience excellence example





The outcome of leveraging the Six Pillars as guiding principles with all communications, as well as our more detailed methods and approaches in this proposal, will help WorkForce WV achieve:

- **Improved Unemployment Benefits services and service delivery** through consistent and concise messages and mobile screens that are self-explanatory, user friendly and simple.
- **Reduced system and Unemployment Benefits process complexity and service delivery time** through simplified guided instructions, self-service options, reduced calls, and appeals.
- **Improved quality of Unemployment Benefits services** by using personas to increase trust through positive and thoughtful interactions and communications with claimants, employers, TPAs and other stakeholders.
- **Increased transparency for system users, including claimants and employers** through one stop shop views of claims – similar to ordering a pizza or online shopping – providing the ability for employees, claimants, and employers to have real-time access and insight into status and the next steps to resolving unemployment claims or issues.
- **Reduced time to complete an application for Unemployment Benefits** through streamlined and guided questions in plain and simple language using personas and CX/UX principles and incorporating technology (i.e., Visible Thread) to help ensure wide reach and access to West Virginians.
- **Adoption of plain language that is available in English, Spanish, Vietnamese, French, German, and Persian** using our team of translators coupled with technology, our messaging will speak to the target populations and expand access to benefits.
- **Adoption of industry leading practices from similar System environments** through our vast experience within other labor agencies and health and human service agencies. We are data-driven and will help WorkForce WV show tangible outcomes by implementing leading communications and CX/UX practices.

We have clarity and confidence in the subject matter which helps enable us to message and effectively reach intended audiences to include Unemployment Benefits claimants, WorkForce WV staff, employers, and Third- Party Administrators (TPAs), and other WorkForce WV stakeholders. We bring an agile and versatile approach to supporting WorkForce WV 's communication and CX/UX needs related to UE efforts. We bring everything we know and everything we do to meet your challenges and help you solve your problems.

**5. Quick and Efficient Claims Processing:** In collaboration with WorkForce WV staff, KPMG will develop a robust process to reduce the time taken for claims processing. By automating certain facets, like the password reset process, and expanding support avenues, like call center operations, we will foster that claimants face fewer barriers in their journey.

KPMG's commitment to enhancing the claimant experience is unwavering. Drawing from our rich history of successful engagements and our expertise in behavioral science and human-centered design, we are poised to transform the service delivery for WorkForce WV. Our collaboration promises a future where claimants receive their benefits efficiently and feel valued and understood throughout the process.

#### **Deliverables:**

To provide a comprehensive roadmap detailing integrating behavioral science and human-centered design principles into WorkForce WV's operations, enhancing claimants' experiences and overall service delivery. We will deliver the five components below to Workforce WV.

**1. Behavioral Science Insights Report:**

- Description of behavioral tendencies and biases observed in the target demographics, primarily rural and marginalized communities.
- Recommendations on strategies to improve service delivery based on these insights.

**2. Human-Centered Design Framework:**

- Step-by-step guidelines for integrating user-centric principles into WorkForce WV's operations.
- Illustrative examples of how processes will change post-integration.

**3. Customer Journey Map:**

- Visual representation detailing every interaction point and service claimants receive, from pre-claim inquiries to post-claim reflections.
- Identify existing pain points, areas of excellence, and opportunities for enhancement.

**4. Streamlined Claims Processing Manual:**

- Process documentation detailing the efficient claims process.
- Instructions for WorkForce WV staff on the new processes, including the automated password reset process, extended call center operations, and other refined claim support mechanisms.

**5. Implementation Roadmap:**

- A phased plan outlining the steps to be taken over a specified timeline to execute the recommendations and transformations proposed in the blueprint.
- Identified key milestones, resource allocations, and evaluation checkpoints.

**Outcome Metrics for Evaluation:**

- Reduction in the average time taken for eligibility determinations.
- Increased claimant satisfaction scores post-implementation.
- Reduced the number of claimant queries/complaints regarding the claims process.
- Increased efficiency and effectiveness in call center operations and overall claimant support.

Deliverable(s)	Description
Conduct Literature Scan and Report	Provide comprehensive analysis of existing literature and communications to assess equity and initiate recommendations for improvement
Collect and Review Data for Gap Report	Evaluate customer experience and user experience to capture moments that matter and document gaps
Journey Map with Process Improvement Opportunities	Build a journey map and document process improvement opportunities in now, near and future categories
Process Design Report	Document process designs for implementation in coordination with Workforce WV stakeholders

## Project management

Our Project Management approach will be applied throughout the lifecycle of the project. Specifically, we will confirm that all project stakeholders are performing their duties through key activities such as maintenance of the project plan, governance protocols, status reporting, and scope management. Below is an overview of our approach:

- The project will have a well-constructed project plan. The project plan will be used to validate that the requirements from the SOW are broken down into clear and actionable work streams and that the processes and procedures for execution are agreed to and documented.
- The project will be staffed to support a project of this size and complexity. In addition, we will have the necessary workflows, and processes to help enable transparency and accountability during the implementation.
- The project will have a series of regular status meetings and status reports.
- Timely scheduled meetings and status reporting sessions provide the medium to allow project stakeholders to be informed on a continuing basis.
- The project will have a defined project governance structure that includes an actively engaged steering committee for decision making and guidance on project scope, schedule, and budget. Governance is a critical component that provides structure for the implementation and confirms that the steering committee approves all project initiatives.
- The scope must be established and finalized early, however, a scope and change control management approach will be established to standardize the change control process, provide policies, and monitor change impacts for the implementation.
- We have established protocols that provide for significant management and executive level oversight throughout the engagement. Our Engagement Principal and Engagement Director will be responsible for controlling and coordinating project activities to deliver the services per the contract specifications and KPMG quality policies.

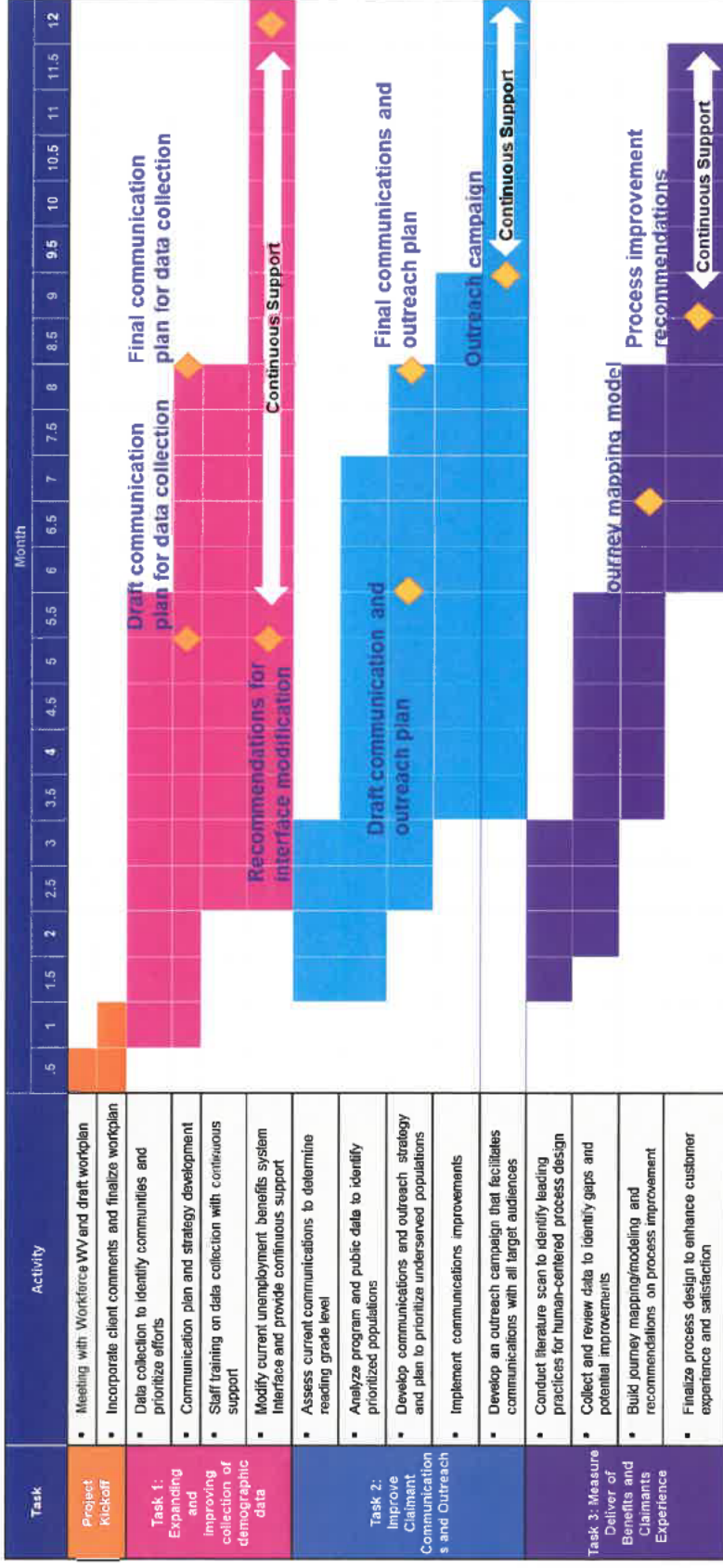
### Deliverables:

Below we list the project management task deliverables.

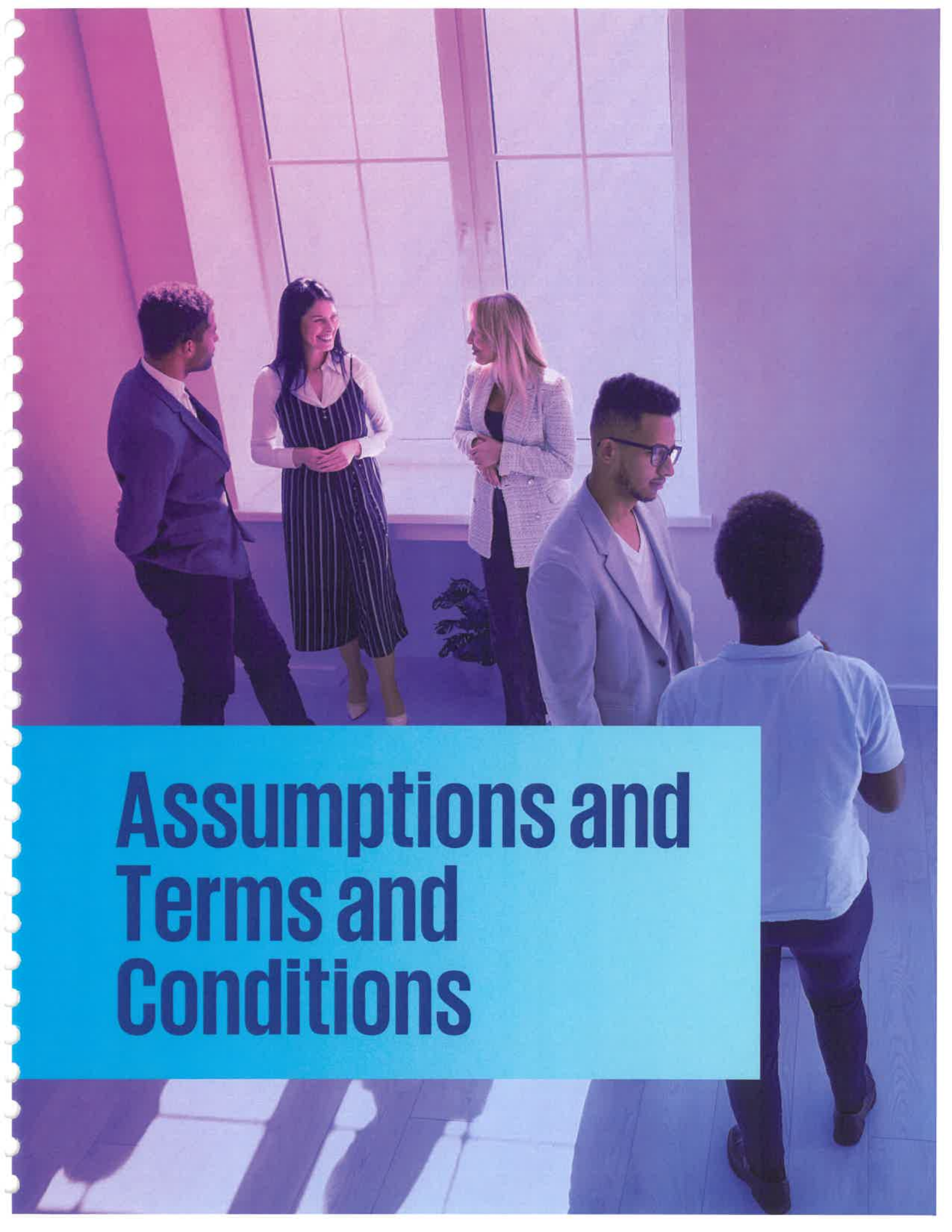
Deliverable(s)	Description
Project Charter	A project charter is a short document that explains the project in clear, concise wording for high-level management.
Project kick-off presentation	Overview presentation reflecting team composition, scope, timeline, and specific deliverables.
Project Workplan	A schedule of detailed activities that will be shared with Workforce WV for approval which reflects timeline to help all parties adhere to contractual scope and schedule.
Bi-Weekly Status Report	Report summarizing accomplishments and next phase activities over a two-week period.
Monthly Project Report	Snapshot of progress over the prior month and a 30-day outlook for upcoming activities and milestones.

## Timeline

The project timeline is 6-12 months, as specified by Workforce WV.







# Assumptions and Terms and Conditions

## Assumptions and Terms and Conditions

KPMG's role is limited to providing the services and deliverables articulated in this proposal. In so doing, KPMG will have no contacts with legislative officials or employees at any level of government for any reason that could be fairly interpreted as public policy advocacy, lobbying, or otherwise be perceived as impairing our objectivity or independence. In no event will KPMG undertake meetings with government officials on behalf of Workforce WV or otherwise appear in a public or private context that could be fairly interpreted as public policy advocacy, lobbying, or otherwise be perceived as impairing our objectivity or independence. In providing our services in general, KPMG professionals will take no view or cannot undertake any role that could be fairly interpreted as public policy advocacy and KPMG's work is not intended to be used as such or in that context. Deliverables will be client-branded or plain-paper and provided as holistic works to be read and interpreted only in their entirety

## Additions, Deletions, and Modifications to Terms and Conditions

WV – CRFP-0323-WWV-2400000001 Unemployment Equity		
Page #	Citation	EXCEPTION / Requested Change
17	Section 3: General Terms and Conditions, 8. Insurance	<p>INSURANCE: The apparent successful Vendor shall furnish proof of the insurance identified by a checkmark below prior to Contract award. The insurance coverages identified below must be maintained throughout the life of this contract. Thirty (30) days prior to the expiration of the insurance policies, Vendor shall provide the Agency with proof that the insurance mandated herein has been continued. Vendor must also provide Agency with <b>immediate 30-days'</b> notice of any changes in its insurance policies, including but not limited to, <b>policy cancelation, policy reduction, or change in insurers.</b> The apparent successful Vendor shall also furnish proof of any additional insurance requirements contained in the specifications prior to Contract award regardless of whether that insurance requirement is listed in this section.</p> <p>Vendor must maintain:</p> <p>Commercial General Liability Insurance in at least an amount of: 1 MILLION per occurrence.</p> <p>Automobile Liability Insurance in at least an amount of: _1_M_IL_L_lo_N per occurrence.</p> <p>Professional/Malpractice/Errors and Omission Insurance in at least an amount of: ____ per occurrence. Notwithstanding the forgoing, Vendor's are not required to list the State as an additional insured for this type of policy.</p> <p>Commercial Crime and Third Party Fidelity Insurance in an amount of: ____ per occurrence.</p> <p>Cyber Liability Insurance in an amount of: ____ per occurrence.</p> <p><del>-Builders Risk Insurance in an amount equal to 100% of the amount of the Contract.</del></p> <p>- Pollution Insurance in an amount of: ____ per occurrence.</p> <p>Aircraft Liability in an amount of: ____ per occurrence.</p> <p>WORKERS' COMPENSATION INSURANCE: Vendor shall comply with laws relating to workers compensation, shall maintain workers' compensation insurance when required, and shall furnish proof of workers' compensation insurance upon request. ...</p>
19	Section 3: General Terms and Conditions, 24. Modifications	<p>24. MODIFICATIONS: This writing is the parties' final expression of intent. Notwithstanding anything contained in this Contract to the contrary no modification of this Contract shall be binding <del>without-unless such modification receives the</del> mutual written consent of the Agency, and the Vendor, with approval of the Purchasing Division and the Attorney General's office (Attorney General approval is as to form only), <u>and is incorporated as a written amendment by the Agency prior to the effective date of such modification.</u> Any</p>

		change to existing contracts that adds work or changes contract cost, and were not included in the original contract, must be approved by the Purchasing Division and the Attorney General's Office (as to form) prior to the implementation of the change or commencement of work affected by the change.
19	Section 3: General Terms and Conditions, 27. Assignment	27. ASSIGNMENT: Neither this Contract nor any monies due, or to become due hereunder, may be assigned by <del>the Vendor</del> <u>either party</u> without the <u>express prior</u> written consent of the <del>Agency, the Purchasing Division, the Attorney General's office (as to form only), and any other government agency or office that may be required to approve such assignments</del> <u>other party, such consent not to be unreasonably withheld, conditioned, or delayed. Any assignment, transfer or delegation in violation hereof shall be null and void.</u>
19	Section 3: General Terms and Conditions, 28. Warranty	1. WARRANTY: The Vendor expressly warrants that <u>services will be performed in accordance with applicable professional standards</u> <del>the goods and/or services covered by this Contract will:</del> (a) <del>conform to the specifications, drawings, samples, or other description furnished or specified by the Agency;</del> (b) <del>be merchantable and fit for the purpose intended;</del> and (c) <del>be free from defect in material and workmanship</del>
21	Section 3: General Terms and Conditions, 35. Indemnification	35. INDEMNIFICATION: The Vendor agrees to indemnify, defend, and hold harmless the State and the Agency, their officers, and employees from and against: (1) Any claims or losses for services rendered by any subcontractor, person, or firm performing or supplying services, materials, or supplies in connection with the performance of the Contract; (2) Any claims or losses resulting to any person or entity injured or damaged by the Vendor, its officers, employees, or subcontractors by the publication, translation, reproduction, delivery, performance, use, or disposition of any data used under the Contract in a manner not authorized by the Contract, or by Federal or State statutes or regulations; and (3) Any failure of the Vendor, its officers, employees, or subcontractors to observe State and Federal laws including, but not limited to, labor and wage and hour laws. <u>Notwithstanding the forgoing, Vendor's obligations under this section shall be subject to, and shall not exceed, Vendor's Limitation of Liability obligations.</u>
26	Section 3: General Terms and Conditions, 46. Additional Terms	<u>a. LIMITATION OF LIABILITY: Notwithstanding anything else in this Contract to the contrary, including all attachments, the liability of the Vendor on account of any actions, damages, claims, liabilities, costs, expenses, or losses in any way arising out of or relating to the Contract or the services performed under the Contract shall be limited to the amount of fees paid to the Vendor under the Contract. The Vendor will not be liable for consequential, special, indirect, incidental, punitive, or exemplary damages, costs, expenses, or losses (including, without limitation, lost profits, and opportunity costs). The provisions of this paragraph shall apply regardless of the form of action, damage, claim, liability, cost, expense, or loss asserted, whether in contract, statute, rule, regulation, or tort (including but not limited to negligence) or otherwise.</u>



26	Section 3: General Terms and Conditions, 46. Additional Terms	<u>b. FORCE MAJEURE: Except for the obligation of a party to make payments required hereunder, neither party shall be responsible for any delay or failure in performance of any part of this Contract or the services contemplated by this Contract to the extent that such delay or failure is caused by reason of acts of God, wars, revolution, civil commotion, pandemic, epidemic, terrorism, acts of public enemy, embargo, acts of government in its sovereign capacity, labor difficulties, including without limitation, strikes, slowdowns, picketing or boycotts, malicious acts of third parties, or any other circumstances beyond the reasonable control of the nonperforming party (each a "Condition"). The delayed party shall be excused from such performance on a day-to-day basis during the continuance of such Condition (and the other party shall likewise be excused from performance of its obligations on a day-to-day basis during the same period); provided, however, that the delayed party shall use commercially reasonable efforts to avoid or remove such Condition, and both parties shall proceed promptly with the performance of their obligations under this Contract whenever such Condition is removed or ceases. If the Condition continues for more than ninety (90) days, then the party affected may terminate this Contract upon written notice to the delayed party.</u>
26	Section 3: General Terms and Conditions, 46. Additional Terms	<u>c. OWNERSHIP: Upon full and final payment to Contractor of fees owed under the Contract, Contractor (i) assigns to Client, all right, title and interest in and to the deliverables except to the extent any Contractor Property is contained therein, and (ii) grants Client a royalty-free, non-exclusive, non-transferable, non-sublicensable perpetual license, to use such Contractor Property solely in connection with Client's internal use of the deliverables. Contractor Property shall mean all intellectual property, technology, know-how, methodologies, works of authorship, and other materials pre-existing the Contract or created, acquired, or licensed separately from the Contract, or created in performance of the Contract which are not specific to Client, including any modifications, enhancements, improvements, or derivative works. Notwithstanding anything herein that may be construed to the contrary, Client agrees that nothing in this Contract prevents Contractor from using Residual Knowledge, which includes generalized knowledge, experience, know-how, or any of the ideas, concepts, methodologies, tools, or techniques derived from or discovered during the provision of the Services performed under the Contract.</u>

26	Section 3: General Terms and Conditions, 46. Additional Terms	<p><u>d. AUTHORIZED THIRD PARTIES: Contractor may engage member firms of the KPMG network of independent firms and/or affiliated third-party providers ("Contractor Resources"), which may be in or outside the United States, to assist in the performance of the services. Contractor remains responsible to Client for the performance of such Services, and adherence to obligations of confidentiality, by any Contractor Resources to the same extent Contractor is obligated under the terms of this Agreement. With the understanding that Contractor will remain responsible to Client for the Contractor Resources, Client acknowledges and agrees that the Contractor Resources will not be subject to flow-down terms set forth in the Contract. In addition, Client acknowledges and agrees that third party service providers ("Vendors") may have access to confidential information from offshore locations, and that the Contractor uses Vendors within and outside of the United States to provide at Contractor's direction administrative or clerical services to Contractor. These Vendors may in the performance of such services have access to Client's confidential information. Contractor represents to Client that with respect to each Vendor, Contractor has technical, legal and/or other safeguards, measures, and controls in place to protect Confidential Information of Client from unauthorized disclosure or use.</u></p>
26	Section 3: General Terms and Conditions, 46. Additional Terms	<p><u>e. USE OF TECHNOLOGIES: Contractor's audit technologies, software productivity tools and certain technology infrastructure and, necessarily, your confidential information, may be hosted in cloud environments operated by Contractor Resources, notwithstanding other requirements of this contract. In addition, Contractor may license certain proprietary and third-party software tools ("Enabling Tools") for use by Client to facilitate the Services. All other use is prohibited. Client may not redistribute, reproduce (except as necessary to run), modify, commercialize, allow third parties to access (unless authorized by Contractor in writing), or reverse engineer or decompile (except where such rights cannot be limited by applicable law) Enabling Tools. Enabling Tools are not intended to be used as a system of record, repository, or hosting service, and Client access to the Deliverables and other documents will be removed from the Enabling Tools within a reasonable period of time following the conclusion of the engagement to which they relate. Client shall download such Deliverables and documents for its records. Client acknowledges that use of Enabling Tools may be used notwithstanding other requirements of this Contract, and may be subject to additional terms specified in an engagement letter or other agreement. Enabling Tools are provided on an "as is," "as available" basis.</u></p>

26	Section 3: General Terms and Conditions, 46. Additional Terms	<p><u>f. DISPUTES: The parties agree that any dispute or claim arising out of or relating to the Contract or the services provided thereunder shall first be submitted to nonbinding mediation as a prerequisite to litigation. Mediation may take place at a location to be designated by the parties using the Mediation Procedures of the International Institute for Conflict Prevention and Resolution, with the exception of paragraph 2 (Selecting the Mediator). If, after good faith efforts, the parties are unable to resolve their dispute through mediation within 90 days after the issuance by one of the parties of a request for mediation, then the parties are free to pursue all other legal and equitable remedies available to them. Nothing herein shall preclude Vendor from filing a timely formal claim in accordance with applicable law provided, however, that Vendor shall, if permitted, seek a stay of said claim during the pendency of any mediation. Either party may seek to enforce any written agreement reached by the parties during mediation in any court of competent jurisdiction.</u></p>
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# Resumes





## James Moore

### Principal

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jamesmoore@kpmg.com

### Function and specialization

James is a Principal in the **Economic and Statistical Services** practice specializing in using leading econometric and statistical modeling techniques and methodologies to support data-driven and evidence-based decision making for our public and private sector clients.

### Five recent clients

- Florida's Department of Economic Opportunity
- Washington Metropolitan Area Transit Authority
- Employment and Training Administration, U.S. Department of Labor
- DC Department of Employment Services
- Massachusetts Executive Office of Labor and Workforce Development

### Skills

- Program Evaluation
- Experimental/Quasi-experimental Methods
- Data Analysis
- Statistical Modeling

### Languages

- English

### Education, licenses & certifications

- Ph.D., Economics, Howard University, 2004
- M.A., Economics, Virginia State University, 1994

## Engagement Lead

### Background

Dr. Moore is an accomplished and results-oriented Labor Economist with a strong record of overseeing and improving federal and state education, social programs, and workforce development programs. Dr. Moore has over 25 years of demonstrated skills in project management, program evaluation, labor economics, education, social program and labor policy, research and survey methodology, analysis of regulations, quantitative research, and data analysis.

Prior to KPMG, Dr. Moore was the Senior Vice President for IMPAQ International where he worked on designing and implementing research and evaluation studies of workforce development, worker protection, education, and international development programs. He is the former the Deputy Assistant Secretary in the US Department of Labor's Office of the Assistance Secretary for Policy. As the Deputy Assistance Secretary, Dr. Moore provided advice and assistance to the Secretary, Deputy Secretary, and departmental leadership on matters of policy development, regulations, and legislation focused on improving the lives of workers, retirees, and their families. Dr. Moore is the former Deputy Commissioner for New Jersey Department of Labor and the former Deputy Director and Chief Economist for the District of Columbia Department of Employment Services. In these roles, Dr. Moore provided oversight for the state's social and workforce development programs, including apprenticeship. He has served on numerous boards and commissions and initiated several innovative workforce development programs to advance training and re-employment services and improve responsiveness to the business community.

Throughout his career, Dr. Moore has served in several oversight or advisory roles within the apprenticeship community. He chaired New Jersey's State Apprentice Council and served on Governor Corzine's Apprenticeship Policy Committee. He worked with the United States Department of Labor, Office of Apprenticeship Training to jointly administer the state's Apprenticeship Program. He also had oversight over a state-run pre-apprenticeship program to increase apprenticeship opportunities for women and minorities in the building trades. He served on the Advisory Committee of New Jersey Pathways Leading Apprentices to a College Education (NJ PLACE), which was a statewide initiative that helps people apply their apprenticeship education toward a degree at participating New Jersey colleges. NJ PLACE was recognized as a "Trailblazer and Innovator" by US Department of Labor.

### Professional and industry experience

#### Recent engagements

- Serve as the **Lead Engagement Partner** providing PMO and program support to DC Department of Employment Service by analyzing Unemployment Insurance Policy Letters (UIPLs), creating work plans, coordinating with DOES team leads to document the

status of compliance actions, and retrieve evidence of work completed to help ensure the UIPL specifications are met.

- Serve as the **Lead Engagement Partner** providing program evaluation services to support Florida's Department of Economic Opportunity (DEO) of the Reemployment Services and Eligibility Assessment (RESEA) program.
- Serve as the **Lead Engagement Partner** providing predictive analytics to support the DC Office of Unemployment Insurance's (OUI) claims process. The overall goal is to develop a flexible and robust predictive analytics model that allows OUI leadership to have greater insight into their data to uncover improper unemployment insurance payments and to identify risky UI claims, claimants, and employers while also helping OUI balance the competing requirements of promptness and accuracy of payments.
- Serve as the **Lead Engagement Partner** supporting Massachusetts' Executive Office of Labor and Workforce Development (EOLWD) by developing a structured approach to identify opportunities to help improve the standardized ways of operating the Labor Market Information group (LMI) to enhance the strategic data processing, data mining, and reporting of labor market data that are core to the Department's vision and institutional priorities. The project is about evaluating LMI's current functions and establishing a roadmap for LMI's future operational structure and operating model with the end goal of generating data synergies across LMI programs in order to be more responsive to key stakeholders.
- Serving as the **Lead Engagement Partner** supporting the District of Columbia, Department of Employment Services, Office of Paid Family Leave (OPFL) with data and predictive analytics support to guide their business transformation. Applying prescriptive analytics, predictive analytics, and descriptive analytics, to assess and measure business unit productivity, predict customer trends and behaviors, and inform strategic business decisions. The engagement also involves developing a forecasting model to perform projections related to paid leave benefit payments and the status of the Universal Paid Leave Implementation Fund.



## **Bharat Gorantla**

*Managing Director*

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### **Function and Specialization**

Data & Analytics, Healthcare Services,  
Data Visualization, Software Engineering,  
Product Management

### **Languages**

English, Telugu

### **Education, Licenses & Certifications**

- MBA, Penn State University
- MSC, Carnegie Mellon University
- BS, Ryerson University

## **Interface Lead**

### **Background**

Bharat is an experienced and versatile director in KPMG's Healthcare Lifesciences Data & Analytics group. He is experienced in both product development and R&D as well as business development, consulting, and service delivery to healthcare providers, payers, and life sciences clients. His specializations include a mixture of both technical and healthcare leadership along with a solid and extensive foundation for data analytics. Bharat possesses a solid foundation in hospital and provider reimbursement programs, and various value-based programs. He currently manages all deliveries in value-based care and reimbursement applications. He has led, and developed products/applications in the Healthcare, Education and Building Architecture domain for over 100+ clients.

Bharat has 12 years of total experience and have previously worked for Siemens Healthcare, cofounded his own dotcom company and Bentley Systems. Bharat has his MBA from Penn State, Master of Software Engineering from Carnegie Mellon University and Bachelor's in Science from Ryerson University, Toronto.

### **Professional and industry experience**

- Bharat worked at Cerner as a Senior Product Manager focusing on defining product roadmaps on healthcare data analytics and business intelligence solutions.
- Bharat architected and developed a high-availability, fault-tolerant application that provided visualization reports (KPIs) and snapshot views of integrated third-party healthcare applications. It was built on Java, Spring, Node JS, and Mongo DB.
- As an Entrepreneur and COO of a startup venture, Bharat was instrumental in architecting the application use-cases and the data models on the various content (video, audio, document) in MySQL. He built the UI screens in Java, GWT and JavaScript. He used Hibernate for easy access to the database.
- Bharat was the technical lead in charge of an automated data analysis tool that extracts quality of care data from all forms of sources (images, free text, structured and other unstructured data). The universal ETL engine allows extracting of data from various clinical and financial systems into a single repository for further analytical processing. This was built on Java and SSIS.
- Bharat design and implemented a universal configuration tool on Java and MySQL for the entire Business Intelligence application suite to significantly reduce human error and cost.
- Spearheaded multiple projects from inception to completion including educational training to C-level executives, and users of the systems.
- Extensive hands-on experience in working with clients on various healthcare IT projects (hospital regulatory and reimbursement requirements).

- Acted as a database administrator to keep internal systems running smoothly.
- Design, setup, and management of IT infrastructure, including several varieties of data SQL/NoSQL persistence layers.





## Huijie (Alice) Yu

Senior Manager

KPMG LLP  
8350 Broad Street,  
McLean, VA 22102

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Cell 919-412-9558  
huijieyu@kpmg.com

### Education, licenses & certifications

- PhD in Economics, North Carolina State University
- MS in Economics, City University of Hong Kong
- BS in Biology, University of Science and Technology of China

### Representative clients

- DC Department of Employment Services
- US Department of Transportation
- Oklahoma Tax Commission
- Puerto Rico Highway and Transportation Authority
- The Partnership of New York City
- Federal City Council
- Multiple commercial banks

### Programming skills

STATA, SAS, SQL, R, Python, MATLAB, and Tableau

### Professional associations

- American Economic Association
- Honor Society of Phi Kappa Phi

## Engagement Director

### Background

Dr. Yu is an econometrician with experience in applying quantitative techniques to solve business problems; these techniques including data analytics, simulations, applied econometrics, and empirical machine learning modeling. She specializes in labor market issues, revenue forecasts, costs and benefits analysis, and fraud analytics applied to social benefits programs. Her experience also includes budget and financial forecasting and financial risk assessment.

Recently Dr. Yu built econometric and financial models to forecast program revenues for different state and local agencies, develop statistical model to identify risk factors for improper payments for unemployment insurance and paid leave benefits, and estimate loss reserves for private financial institutes.

### Professional and industry experience

#### *Econometric Modeling to Support Federal and State/Local Agencies*

- Developed regression analyses and statistical learning models to assist a state workforce/employment agency in understanding the trend of its Unemployment Insurance Trust Fund (UITF) balance from 2020 – 2027. Provided considerations to help replenish the UITF in the future after the fund depletion due to the COVID-19 health pandemic. Built machine learning models to study UI improper payments and identified key features to predict potential fraudulent claims.
- Assisting a state workforce development agency's Paid Family Leave Program in (1) using time series model to forecast the trust fund balance of the program, benefits usage, and tax contribution, (2) developing data visualizations to help the agency's decision making, (3) providing training to program staff, and (4) building fraud analytics to help identify potential fraudulent claims activities.
- Conducted an economic sector research and supported a non-profit organization's recovery efforts during the COVID-19 health pandemic. Labor market trends, revenues, industry challenges and opportunities, and recommendations were included in this study focusing on the leisure/hospitality industry and the art/entertainment industry.
- Led an engagement and built visualization tools to assist a state workforce development agency. Tasks included managing and analyzing employment program data, developing dashboards using Tableau, conducting predictive analyses (logistic regressions) in Python and TabPy (an application programming interface), and presenting findings to the client management team.
- Reviewed methodology and validated SAS cash flow models (multiple regression models) used by a large federal agency to estimate the subsidy cost of its major loan programs. The focus of the review was the reasonableness of the model assumptions, documentation and calculations used to estimate program subsidy costs.
- Assisted a state highway authority and built an econometric model (time series model) to forecast the construction industry cost and revenue in this state under various investment scenarios. Interviewed highway construction firms and conducted industry research and literature study. Applied **Monte Carlo** simulation to project construction labor movement, used regression analyses to forecast material input prices, and assessed economic impact of the statute change in minimum wage in this state.

- Led a data analytics project to support a federal transportation authority's safety data initiative. Tasks included conducting environment scan, analyzing proprietary hazard warnings data collected by a traffic data company, and designed regression models and machine learning methodologies to identify relationship between hazard warnings and traffic accidents. This research will be used by the agency to develop applications to help highway patrols or drivers to understand potential road hazards in real-time and potentially reduce the likelihood of crashes.

#### ***Financial and Econometric Modeling for Private Industry***

- Assisted one of the largest U.S. commercial banks to validate econometric models and conduct stress testing analyses for 2018 Current Expected Credit Loss (CECL) compliance. Used SAS to independently replicate econometric models, developed performance testing, as well as CECL prediction for a retail mortgage model. Validated and reviewed R codes and model documentation, examined reasonableness of model assumptions, built benchmark models, made recommendations to enhance model performance for a corporate bond model.
- Assisted multiple large U.S. commercial banks to monitor and manage regulatory, legal, and reputational fair lending risk in home loans. Used SAS to develop and implement economic and statistical analyses including logistic regressions and linear regressions and reviewed the underwriting and pricing of single-family home loans, multi-family home loans, and home equity loans.
- Conducted regression analyses and data analyses to assist preparation of testimony to the Copyright Royalty Board on behalf of devotional TV programs as part of the proceeding to determine devotional TV's broadcast royalties.

#### ***Economic Impact Study***

- Led an economic impact study and assisted a non-profit membership organization in NYC to explore economic treatments to accelerate recoveries during the COVID-19 health pandemic. An economic impact tool, IMPLAN, was applied to calculate the direct, indirect, and induced economic impacts under different treatment scenarios.
- Assisted a large entertainment park and conducted an economic contribution study. Calculated the direct, indirect, and induced economic impacts in employment and tax revenues under multiple investment scenarios.

#### **Publication**

Sun, Shiyong, Jun Li, Ying Xiong, Huijie Yu, and Nan Tao, "A Novel Method for Fabrication of Unique Cobalt Nanostructure," Chemistry Letter Vol.36 (2007), No. 10, P1222-1223



## Andrew Komendantov

### Manager

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andreikomendantov@kpmg.com

#### Function and specialization

Andrew Komendantov is an economist in KPMG's Economic and Valuation Services (EVS) practice, specializing in the applications of economic modeling and data analytics.

#### Representative clients

- Washington Metropolitan Area Transit Authority
- Federal Railroad Administration
- Amtrak

#### Languages

English, Russian, French

#### Education, licenses & certifications

- MA in Applied Economics, Georgetown University, 08/2020
- BS in Economics, George Mason University, 05/2012

#### Programming skills

- R, Stata, VBA

## Senior Data Analyst

### Background

Andrew Komendantov is an economist in KPMG's Economic Services team with experience in econometric and data analysis, economic impact analysis, and cost-benefit analysis, including monetizing user and non-user benefits. Prior to joining KPMG, Mr. Komendantov worked as an economic consultant in the transportation and infrastructure sector for over five years.

### Professional and industry experience

- Oversaw the development of construction cost input forecasts for a state railway transit agency. Models utilized econometric and machine learning approaches to forecast the cost of main construction materials and labor.
- Supported a state agency in identifying eligible populations for a water utilities assistance program. Using American Community Survey data and QGIS, developed heatmaps that visualize the spatial variation in socioeconomic metrics of interest, such as number and share of individuals earning under 60% of State Median Income, number of Spanish speakers, number of people with disabilities, number of people over age 60, as well as others.
- For a federal health agency, maintained and further developed multiple web-based, interactive geographic visualizations using modern web-frameworks (including d3.js), which assisted the client in analyzing their data to identify regions with disparities in health outcomes.
- Performed validation and review of multiple credit risk models for several financial services clients. Model validation included review of methodology as well as code.
- To assist a major consumer goods manufacturer, developed forecast models to predict the prices of steel and plastic in various countries using machine learning methods in the R programming environment. The forecast included multiple scenarios representing raw material prices under different climate goals.
- For a multinational toll road operator, developed long range forecast models of highway construction and operation input costs using a combination of econometric and machine learning approaches. Models forecasted costs of construction materials such as steel, asphalt, and concrete, as well as construction labor, electric utilities, and insurance across multiple North and South American countries.
- For a confidential client, developed forecasting models for the second-largest toll road network in France by applying a combination of econometric and machine learning approaches. Developed maps visualizing traffic data using GIS software.
- Supported a major transit agency as part of a team to perform economic analyses for a variety of projects and initiatives, including evaluating the feasibility of rolling stock upgrades, network capacity expansion, and demand forecasting for transit services. Tasks included data collection, validation, and cleaning, as well as performing of various quantitative analyses.
- For a state department of transportation, developed cost indices and, subsequently, forecasts, for a highway construction project based on its specific mix of materials and labor needs, projected cost of construction materials, and local labor outlook. Forecast helped client anticipate market shocks that would hinder its ability to accurately budget and fund the project. Performed periodic updates to the forecast based on client's needs.

### **Publications and speaking engagements**

- Loetterle, F. E., M. Johnson, C. Quandel, C. Barr, A. Komendantov, and T. Horst. Case Study of Benefit–Cost Analysis of an Intercity Passenger Rail Service. *Transportation Research Record: Journal of the Transportation Research Board*, Vol. 2608, 2017, pp. 78–85.
- Araki, Y., S. Fukahori Mensah, A. Komendantov, and P. Macchi. (2018). Infill stations and their effect on system ridership. *Transportation Research Board 97th Annual Meeting*, January 7-11, 2018, Washington DC, United States (presentation).





## John P. Collins

### Manager

KPMG LLP  
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jpcollins@kpmg.com

#### Function and specialization

John specializes in large-scale data analysis, as well as crafting solutions to client problems that are not sufficiently addressed by standard methods.

#### Professional associations

- American Statistical Association

#### Education, licenses & certifications

- B.A. in Mathematics, Reed College
- Ph.D. in Mathematics, University of Oregon

## Senior UI Data Analyst

### Background

John Collins is a Manager in KPMG's Economic Services practice, having joined the firm in January 2019. He has over 9 years of experience working with Federal clients to improve the efficiency of their business processes and provide insight into program outcomes through use of innovative statistical techniques. In these federal engagements he has taken part in the development of new measurement instruments to improve the accuracy and consistency of agency decisions, as well as analytical tools to automate or facilitate the conduct of business processes.

### Professional and industry experience

John has extensive experience working with confidential data sources from state, federal, and commercial clients, including handling of PII and PHI, to perform quality assessments of program function through quantitative and qualitative methods, including predictive modeling, agent-based models, and both supervised and unsupervised machine learning. His work with the firm includes:

### Current projects

**A State Department of Labor & Industry (04/2022 to Present). Manager.** Program evaluation of local and state-wide business workforce services and review of leading practices. This engagement uses mixed methods, combining both quantitative and qualitative approaches in its evaluation methodology.

**KPMG Commercial Audit Client (04/2020 to Present). Statistician.** Loyalty program breakage rate analysis using client liability estimates from time series and cluster analysis models. Cloud computing was used to facilitate analyses due to large size of the data.

**DC Local Government (05/2020 to Present). Statistician.** Economic forecasting for a new local benefits program. Analysis of estimated tax contributions and benefits taken in advance of program launch while accounting for the impact of COVID-19 on the local economy, as well as industry-specific wages and employment.

### Completed projects

**A State Department of Labor (03/2022 to 08/2022). Manager.** Built and delivered economic forecasting models for the state's unemployment insurance program. Models included optional functionality to simulate recession impacts and programmatic changes.

**A State Department of Economic Opportunity (02/2021 to 02/2022). Manager.** Multi-year engagement in which John is managing the development of program implementation and impact evaluation studies of a federal program administered by the state's DEO. The engagement blends quantitative and qualitative study design methodologies.

**A Large Federal Agency (08/2019 to 06/2020). Statistician.** Data-driven analytics for scoring the agency's site inspections program under an updated set of inspection standards. Due to COVID impacts on inspection routines, inspections using the new standards were delayed until after the engagement period, so a crosswalk was created between the old and new inspection standards to simulate new inspection outcomes based on historical data. The model was then fit to the simulated data for suitability and validity testing. Further validation performed by designing a ranked choice survey of agency content experts and analyzing results

with rank aggregation algorithms. The survey design was chosen to help **improve information provided while reducing respondent burden on federal staff.**

**A State or Local Government Transportation Agency (07/2019 to 02/2020).**

**Statistician.** Business analytics and dashboards for accounting to strengthen internal audit controls and increase efficiency and accuracy of payroll processing.

**A Large Federal Agency (01/2019 to 06/2019). Statistician and program analyst.**

**Performed workload forecasting to identify existing and potential future processing backlogs** by geolocation and business process stage to improve the agency's allocation of resources. Text mining of free response fields to identify major work area categories and weekly hours per category due to constraints that prevented running a full time and motion study.

#### **Technical skills**

Python, R, Stata, Excel.

#### **Publications and speaking engagements**

John is the author of articles on multiple topics in methods and medical research, including the effectiveness of decision methods in the absence of certainty. Selected publications of his are provided below.

- Dieter WB, Collins JP. (2019) Predicting outcomes within an innovative post-acute rehabilitation model for older adults. *BMC Geriatrics* 19, 146. doi: 10.1186/s12877-019-1147-6.
- Puri S, Herrick JE, Collins JP, Aldhahi M, Baattaiah B. (2017). Physical functioning and risk for sleep disorders in US adults: results from the National Health and Nutrition Examination Survey 2005-2014. *Public Health* 152; 123-128. doi: 10.1016/j.puhe.2017.07.030.
- Tang L, Yuan A, Collins J, Che X, Chan L. Unified least squares methods for the evaluation of diagnostic tests with the gold standard. (2017). *Cancer Informatics*. doi: 10.1177/1176935116686063.



## Stephanie Gore

*Director*

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### Function and specialization

Stephanie produces result-oriented, modernized solutions for leaders who are committed to transforming their organizations. As a skilled transformation leader, change strategist and program manager, she has led large-scale, mission-critical projects in government and commercial sectors.

### Representative clients

- Defense Counterintelligence and Security Agency
- Florida Department of Economic Opportunity
- California Employment Development Dept.
- District of Columbia Government
  - Department of Employment Services (DOES)
  - Office of Tax and Revenue (OTR)
- United States Department of Veteran Affairs
- US Department of Health and Human Services

### Education, licenses & certifications

- BS degree, Marketing, University of Maryland
- Project Management Professional (PMP)
- Certified Change Management Practitioner (CCMP), PROSCI®
- Certified Facilitator (ATD)
- Lean Six Sigma Green Belt

## CX/Communication Lead

### Background

Stephanie produces result-oriented, modernized solutions for leaders who are committed to transforming their organizations. As a skilled transformation leader, Prosci® certified change strategist and program manager, she has led large-scale, mission-critical projects (organization size range from 500-25,000 ppl) in government and commercial sectors. Most recently, she led efforts to help three states inventory and assess compliance with UC rules, laws and regulations issued by Federal and State. Stephanie possesses and brings a wide range of transformation skills to DEO including organizational development, change adoption, target operating model planning and implementation, strategic planning, re-imagining processes, activating governance models, facilitation, and leadership coaching.

Stephanie helps enable leaders, sponsors, and teams to unlock capabilities in their organization to accelerate the pace of adoption using leading methods tailored to engage key stakeholders, manage resistance, deploy communications strategies, and increase knowledge management. She will align strategies to your culture to help achieve greater buy-in and sustainment. Stephanie applies tangible, outcome-based metrics and approaches to help increase return on investment for your transformation initiatives.

### Professional and industry experience

Stephanie's professional and industry experience includes the following:

- Led unemployment compensation modernization pandemic surge efforts to assist labor agencies in improving outcomes related to policy, compliance, communications/outreach, training, legacy system operations and independent verification and validation.
- Led Unemployment Insurance and Paid Family Leave transformation and process improvement initiatives to improve the flow of applicants, employer participation, internal agency support, and leadership alignment. The results to-date include documenting over 50+ agency processes (for the first time), targeting waste and identifying over 1,500 prioritized opportunities to coach change champions through the implementation of process improvements.
- Led change management efforts over a multiyear tax implementation to move the agency from an antiquated outdated system to a modernized cloud-based tax system. In this role, Stephanie's team used leading industry behavioral change management methods and approaches to gain rapid adoption and increase employee engagement. Most recently they supported the implementation and migration of \$2.7B of real property taxes from COBOL into the modernized platform to include establishing KPIs and performance metrics for agency internal and external reporting.
- Led the organizational change and knowledge management teams through the Business Process Re-engineering Implementation (BPRI) journey to transform the Nation's personnel security investigative process. Within 18 months, their efforts contributed to the agency's backlog reduction from over 725,000 cases to a steady state of 200,000 cases. Stephanie's team developed and implemented change strategies to capture and engage employees and external stakeholders toward achieving their goals. She also led Strategic Advisory Group meetings, developed Senate briefings, and infused change management leading practices

into multiple initiatives to help improve workforce awareness and drive user adoption.

- In support of system owner integration, Stephanie facilitated a series of strategic workshops to help enable systems owners across the agency to analyze, streamline and design end-to-end processes from a user experience (Ux) perspective. Through the series of workshops, the leaders established improved relationships and trust to develop a three (3) year strategic plan that is actively under execution.
- Developed and aided the CIO of a large government agency publish a multiyear strategic plan. Stephanie engaged leaders in governance efforts to help develop content, gain support, and improve accountability and ownership over initiatives. Additionally, she led change management and communications activities for their Information Technology Infrastructure Library (ITIL) and strategic sourcing initiatives.





## **Talmadge Cooper**

*Advisory Associate*

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### **Five recent clients**

- Global Professional Services Firm

### **Education, licenses & certifications**

- University of Florida, Master of Management
- Google Data Analytics Certificate

## **Analyst**

### **What can I do for you?**

I have extensive experience integrating the change principles for specific projects within chain and manufacturing companies. Also, I have gained experience working with internal clients on change impacts revolved around strategic company initiatives such as CPA, Pricing, and MBET.

### **Three recent engagements**

- I supported the Transformation Management Office and the portfolio change team that is located within our strategy transformation office. My focus is to gather change impacts and utilize Power BI to facilitate points of connection between different workstreams
- I put together visuals to assist in the development of key upcoming implementations from workstreams by providing a visual representation of change impacts on a Change Management Dashboard presented to the Leadership Committee
- Worked with SAP and Oracle ERP systems within supply chain and manufacturing organizations to better assist clients in understanding their business performance and needs



## Tracy Newsome

*Sr. Associate, Advisory |  
TD Health & Government*

TRACY NEWSOME, KPMG LLP

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Tallahassee, FL 32301  
tnewsome@kpmg.com  
Tel +1 (850) 385-6272  
Cell +1 (850) 556-5423

### Recent engagements

- Lurie Children's Hospital
- Novelis
- State Government

### Education, licenses & certifications

- Change Management Professional Certification
- Bachelor of Science in Mathematics Education

## Analyst

### What can I do for you?

I am a Change Management professional with experience in assisting State Government and Healthcare technology projects prepare for and implement change by addressing the people, process, organizational structure, systems, and technology aspects of change.

Leveraging experiences, I will assist your organization to help ensure change is aligned with business strategy, provide strategy for successful adoption, and drive transformation success for projects and departments.

### Engagement experience

- Currently, I am supporting a team at Lurie Children's Hospital with development of an adoption and sustainability strategy for leadership and employees using the department's recently implemented Workday application. By creating a Change Plan, a Leadership and Admin Professionals Roadmap, a Change Leadership Capability Assessment, and Change Readiness Survey and Report, our client will have the necessary tools and insight to maintain momentum among leadership, and guide leaders and employees in using Workday to manage their teams, complete employee self-service activities, and fulfill day-to-day tasks. Our strategy will help optimize the department's leadership, change leadership, and employee experience of using Workday, thereby contributing to the time efficiency of administrative task; allowing more time to devote to patient and business matters.
- I assisted our team in developing a High-Level Change Readiness strategy for the redesign of Novelis' Service Delivery Model. The strategy incorporates many components of Organizational Change Management which will meet the needs of Corporate, Business Area, and Shared Services stakeholders during implementation of the new processes.
- As a Change Enablement Advisor working with State Government, I was charged with identifying change management needs and developing a change strategy and plan for an enterprise-wide technology project which would upgrade the state agency's Employee Directory search engine. Due to varying data sources, decentralized users, and stakeholder trust issues with data accuracy, this project relied heavily on Communication, Leadership Alignment, and a Change Champion Network. This change strategy aligned with the project plan which contributed to successful implementation of the new Employee Directory.



# RFP forms



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

State of West Virginia  
Centralized Request for Proposals  
Service - Prof

Proc Folder: 1159340

Doc Description: Addendum No 1 - UNEMPLOYMENT EQUITY PROJECT

Reason for Modification:

Addendum No 1 is issued to publish vendor questions with responses and to modify the bid opening date.

Proc Type: Central Contract - Fixed Amt

Date Issued	Solicitation Closes	Solicitation No	Version
2023-08-28	2023-09-06 13:30	CRFP 0323 WV2400000001	2

BID RECEIVING LOCATION

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

VENDOR

Vendor Customer Code: 000000105404

Vendor Name : KPMG LLP

Address :

Street : 8350 Broad Street, Suite 900

City : McLean

State : VA

Country : USA

Zip : 22102

Principal Contact : James H. Moore, Jr., Principal

Vendor Contact Phone: 301 919 9046

Extension:

FOR INFORMATION CONTACT THE BUYER

Toby L Welch  
(304) 558-8802  
toby.l.welch@wv.gov

Vendor

Signature X

FEIN#

13-5565207

DATE

September 6, 2023

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

Date Printed: Aug 28, 2023

Page: 1

FORM ID: WV-PRC-CRFP-002 2020105



**ADDITIONAL INFORMATION**

Addendum No 1 is issued for the following reasons:

- 1) To publish a copy of vendor questions and responses.
- 2) To modify the bid opening date from 08/30/23 to 09/06/2023.

-no other changes-

\*\*\*\* Online responses have been prohibited for this solicitation, if you have questions contact the Buyer - Toby Welch @ toby.l.welch@wv.gov

See attached instructions for requirements for responding.

INVOICE TO	SHIP TO
WORKFORCE WEST VIRGINIA 1900 KANAWHA BLVD, EAST BLDG 3, 3RD FLOOR, SUITE 300 CHARLESTON WV 25305 US	WORKFORCE WEST VIRGINIA 1900 KANAWHA BLVD, EAST BLDG 3, 3RD FLOOR, SUITE 300 CHARLESTON WV 25305 US

Line	Comm Ln Desc	Qty	Unit of Measure	Unit Price	Total Price
1	Unemployment Equity Expansion & Improvement of Data Collect	0.00000	EA		

Comm Code	Manufacturer	Specification	Model #
80000000			

**Extended Description:**

Vendors MUST fill out Cost Sheet included as an attachment and All cost information must be contained in the cost proposal, which must be sealed and submitted in a separate envelope from the technical proposal.

**\*\*ONLINE SUBMISSIONS OF REQUESTS FOR PROPOSAL ARE PROHIBITED\*\***

**SCHEDULE OF EVENTS**

Line	Event	Event Date
1	Questions are due by 3:00 p.m.	2023-08-23

**SOLICITATION NUMBER: CRFP WWW2400000001**

**Addendum Number: 1**

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The purpose of this addendum is to modify the solicitation identified as ("Solicitation") to reflect the change(s) identified and described below.

**Applicable Addendum Category:**

- ☒ Modify bid opening date and time
- ☐ Modify specifications of product or service being sought
- ☒ Attachment of vendor questions and responses
- ☐ Attachment of pre-bid sign-in sheet
- ☐ Correction of error
- ☐ Other

**Description of Modification to Solicitation:**

Addendum No 1 is issued for the following reasons:

- 1) To publish a copy of vendor questions and responses.
- 2) To modify the bid opening date from 08/30/23 to 09/06/2023.

-no other changes-

**Additional Documentation:** Documentation related to this Addendum (if any) has been included herewith as Attachment A and is specifically incorporated herein by reference.

**Terms and Conditions:**

1. All provisions of the Solicitation and other addenda not modified herein shall remain in full force and effect.
2. Vendor should acknowledge receipt of all addenda issued for this Solicitation by completing an Addendum Acknowledgment, a copy of which is included herewith. Failure to acknowledge addenda may result in bid disqualification. The addendum acknowledgement should be submitted with the bid to expedite document processing.

Revised 6/8/2012

**ADDENDUM ACKNOWLEDGEMENT FORM**  
**SOLICITATION NO.: CRFP WV24\*001**

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

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

**Addendum Numbers Received:**


(Check the box next to each addendum received)

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

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

KPMG LLP

\_\_\_\_\_  
Company

  
\_\_\_\_\_  
Authorized Signature

September 6, 2023

\_\_\_\_\_  
Date


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

**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.

(Printed Name and Title) James H. Moore, Jr., Principal  
(Address) 8350 Broad Street, Suite 900, McLean, VA 22102  
(Phone Number) / (Fax Number) T: 703 286 8000 F: 703 286 8010  
(Email address) jamesmoore@kpmg.com

**CERTIFICATION AND SIGNATURE:** By signing below, or submitting documentation through wvOASIS, I certify that: I have reviewed this Solicitation/Contract 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/Contract 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 this bid or offer was made without prior understanding, agreement, or connection with any entity submitting a bid or offer for the same material, supplies, equipment or services; that this bid or offer is in all respects fair and without collusion or fraud; that this Contract is accepted or entered into without any prior understanding, agreement, or connection to any other entity that could be considered a violation of law; 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.

By signing below, I further certify that I understand this Contract is subject to the provisions of West Virginia Code § 5A-3-62, which automatically voids certain contract clauses that violate State law; and that pursuant to W. Va. Code 5A-3-63, the entity entering into this contract is prohibited from engaging in a boycott against Israel.

KPMG LLP  
(Company)  
  
(Signature of Authorized Representative)  
James H. Moore, Jr., Principal  
(Printed Name and Title of Authorized Representative) (Date)  
301 919 9046  
(Phone Number) (Fax Number)  
jamesmoore@kpmg.com  
(Email Address)

Revised 11/1/2022



# REQUEST FOR PROPOSAL

CRFP WWV2400000001

## Unemployment Equity Project

Step 2 – 1 X 30 = Total Cost Score of 30

Proposal 2: Step 1– \$1,000,000 / \$1,100,000 = Cost Score Percentage of 0.909091 (90.9091%)  
Step 2 – 0.909091 X 30 = Total Cost Score of 27.27273

- 6.8. Availability of Information:** Proposal submissions become public and are available for review immediately after opening pursuant to West Virginia Code §5A-3-11(h). All other information associated with the RFP, including but not limited to, technical scores and reasons for disqualification, will not be available until after the contract has been awarded pursuant to West Virginia Code of State Rules §148-1-6.3.d.

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.

KPMG LLP

(Company)

James H. Moore, Jr., Principal

(Representative Name, Title)

301 919 9046

(Contact Phone/Fax Number)

September 6, 2023

(Date)

Revised 07/01/2021