



**ALVAREZ & MARSAL
PUBLIC SECTOR SERVICES**

State of West Virginia
Performance Evaluation Audit

CRFP GOV2600000001

Technical Proposal

Date of Submission:

July 23, 2025

Prepared for:

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WV PURCHASING
DIVISION

July 23, 2025

Toby Welch
Department of Administration
Purchasing Division

Mr. Welch,

Alvarez & Marsal Public Sector Services LLC (A&M) is pleased to submit to the State of West Virginia's Department of Administration our technical proposal to conduct a performance evaluation audit. Given our experience completing multiple statewide assessments of the same size and scale as the State of West Virginia, we believe that we are well qualified to assist you in achieving the effort's objectives. As requested, our review is proposed to support the State's commitment to achieving the desired quality of service and fiscally responsible management that the citizens of West Virginia expect. A&M's proposal demonstrates our ability and the past experience necessary to successfully drive increases in efficiency and effectiveness across the Departments of Homeland Security (DHS), Human Services (DoHS), and Transportation (DOT).

Our team understands the challenges facing the State of West Virginia with increased demands to deliver more services with limited resources. Our professional team is experienced in statewide efficiency and effectiveness reviews and enabling governments to increase transparency and accountability for the allocation of state and local government resources. In addition, we have unique experience supporting efficiency and effectiveness reviews at the departmental levels, including health and human services organizations and transportation organizations. These experiences will engender credibility with agency leadership, which is critical to driving support for the recommendations.

Given our experience working with multiple states where we routinely coordinate with Governor's Offices, legislatures, and oversight bodies, and at the agency level, A&M appreciates the importance of coordination across government entities and the value of cooperation between executive, legislative and cabinet level offices to drive transformative change. We have testified in multiple states and have supported the passage of legislation to drive transformational change at the agency level. Such significant change would not have occurred without the support of that state's Governor and/or legislature, its research and analytical staff, and buy-in from agency employees at all levels.

A&M is uniquely positioned to support a review of West Virginia government through its hands-on, execution-oriented approach. Known as "operators, not just advisors," A&M brings deep expertise in crisis management, turnaround, and performance improvement - delivering tangible results rather than just recommendations. Our teams are empowered to move quickly, navigating bureaucracy and driving high-velocity decision-making critical for government transformation. A&M thrives in complex, ambiguous environments where standard playbooks fall short, enabling them to design and implement innovative, tailored solutions. With a focus on long-term value creation, we do not just develop strategies. We regularly stay engaged in implementing and measuring results. Unlike firms that rely on frameworks and presentations as proxies for impact, A&M is relentlessly focused on outcomes such as organizational effectiveness and efficiency

and improved service delivery. Our client-obsessed culture and entrepreneurial mindset make us an ideal partner in building a more efficient and effective government, ultimately improving citizen outcomes for the State of West Virginia.

Thank you for this opportunity to serve. We are committed to providing the State with our expertise and proven track record for fiscal and operational solutions in the public sector. We are confident we can provide the State with outstanding outcomes.

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.

Alvarez and Marsal Public Sector Services, LLC
(Company)

Aaron Umberger, Managing Director
(Representative Name, Title)

(571) 926-4679/(202) 729-2101
(Contact Phone/Fax Number)

July 23, 2025
(Date)

Sincerely,



Aaron Umberger
Managing Director

Table of Contents

1.0 Executive Summary	1
2.0 About Alvarez & Marsal (RFP 4.5)	3
3.0 Why A&M?	6
4.0 Technical Approach	7
4.1. Our Understanding	7
4.2. Our Approach	9
4.3. Phase 1 – Discover.....	11
4.4. Phase 2 – Analyze.....	14
4.5. Phase 3 – Recommend.....	16
4.6. Project Schedule	17
5.0 Qualifications & Experience	18
5.1. A&M’s Expertise, Resources, Capacity, Capability, and Experience (4.5.1.1).....	18
5.2. A&M’s Experience Delivering Similar Projects and References (4.5, 4.5.1.2).....	18
5.3. Staffing	25
5.3.1. Personnel Biographies	27
5.4. Existing or Potential Conflicts of Interest (4.5.2.2).....	31
5.5. Data Protection Standards and Confidentiality Agreements (4.5.2.3).....	31
5.6. Nondisclosure Agreement (4.5.2.4).....	32
5.7. Litigation, Investigations, Fines, or Enforcement Actions Disclosure (4.5.2.5)	36
Appendix A: Designated Contact	37
Appendix B: RFP Certification	37
Appendix C: Addendum Acknowledgement Form	38

1.0 Executive Summary

Government efficiency is a key goal of Governor Morrissey's administration. The Office of the Governor of West Virginia needs a comprehensive and expert evaluation of current state operations to develop a succinct and achievable plan to deliver services to West Virginians more effectively and efficiently. Governor Morrissey has committed to making West Virginia's government work well for its citizens by streamlining processes, reducing bureaucracy, and modernizing operations. Evaluating the Departments of Human Services, Homeland Security, and Transportation directly aligns with these goals, as each plays a critical role in delivering high-impact services, managing major state resources, and ensuring public safety. By assessing and improving performance in these departments, the state can take meaningful steps toward building a more responsive, accountable, and efficient government. Alvarez and Marsal Public Sector Services (Alvarez & Marsal or A&M) is the right partner to deliver on this key set of initiatives for the Governor's Office and West Virginia constituents.

A&M is the world's leading turnaround management and restructuring firm. **For over 40 years, our professionals have served organizations in need of transformative leadership advisory support from trusted advisors with a keen focus on enhancing operations while improving service delivery.** By combining state-level insights with a bias towards action, A&M is uniquely positioned to deliver premier operational analysis services to the State of West Virginia, enabling the state to improve operations and service delivery, and leveraging innovative solutions to realize cost efficiencies and sustainably deliver on these agencies core missions in support of state operations.

A&M has successfully supported several state governments in achieving their most ambitious goals, delivering more efficient operations and enhanced service delivery. This experience, coupled with the expertise of our team members – who represent efficiency and effectiveness experts and consultants with deep experience operations for similar agencies at the state and federal level – positions A&M as an ideal partner to support West Virginia in achieving its mission of delivering world-class services to its constituents in the most efficient and cost-effective manner.

How A&M will Deliver Services that Meet West Virginia's Requirements and Objectives

Given that several of our team members have performed statewide efficiency work for similarly sized and situated states such as Wyoming, Louisiana, Kansas, Rhode Island, New Hampshire, and Oregon, **we understand the unique considerations, challenges, and opportunities facing the State of West Virginia in this effort.** Providing operational analysis for resource rich, independent, and nature-focused states like West Virginia means addressing unique challenges of geographically disbursed populations and corresponding rural infrastructure gaps, low labor force participation due to poor health outcomes and outmigration, unpredictable revenue streams due to commodity volatility, varied constituent needs by geography, and a desire for limited government intervention in private affairs. Advisors must leverage their expertise to navigate these complexities and deliver tailored solutions that support each agency's mission and increase efficiency.

Underpinning this is A&M's proven hands-on **Discover-Analyze-Recommend-Transform (DART) methodology**, which ensures that we do not simply advise – we co-create solutions, facilitate execution, and deliver measurable outcomes. We will embed within each agency's existing structure (Department of Homeland Security (DHS), Department of Human Services (DoHS), and Department of Transportation (DOT)), building on the strengths of its current operations while equipping leaders with actionable strategies to enhance financial and operational performance – ultimately improving the states operations and delivering a significant return on the State's investment in A&M.

A&M's Proven Track Record in Delivering Similar Services and Outcomes to Other States

Our team is comprised of seasoned professionals with extensive experience in financial and operational improvement and transformation services, particularly for other state governments. This is demonstrated by our **successful delivery of similar services for several other clients**, including the States of Wyoming, Louisiana, New Hampshire, and Oklahoma, among others. A&M has delivered results in these efforts – leading to billions of dollars in cost reductions and operational efficiencies and improved constituent service delivery and outcomes.

Proposed Team Knowledge and Proven Track Record in Statewide Efficiency Results

The proposed team highlighted below **positions A&M as an ideal partner to support West Virginia in analyzing operations and recommending options to increase efficiency and effectiveness.** The A&M team members bring varied expertise in statewide efficiency delivery, financial analysis, operational analysis, workforce and resource optimization, and technology modernization.

- **Engagement Executive Aaron Umberger** has 16 years of experience delivering efficiency and effective outcomes for government clients. He specializes in strategic engagements focused on reducing costs and improving operations. He possesses extensive knowledge of operational improvement, having supported Defense strategic transformation initiatives, General Services Administration (GSA) category management initiatives, and the cost-effective procurement of supplies and services for Department of Defense (DoD), Department of Homeland Security (DHS), and various other organizations.
- **Engagement Quality Reviewer and HHS Subject Matter Expert Daniel Harlan** brings nearly 20 years of state and federal experience, supporting public sector leaders to drive transformational change, manage federal resources and achieve operational sustainability across a broad range of HHS programs. He brings a hands-on approach to improving financial and operational management of public sector programs with a focus on health and human services. He specializes in data-driven financial and operational assessments, business process re-engineering, and strategy development in complex operational, financial and IT environments. Mr. Harlan led operational transformations for Maryland’s developmental disability administration and Rhode Island Department of Children Youth and Families, driving change to better leverage federal funds and align operational practices with programmatic goals and outcomes. Additionally, Mr. Harlan has recently led efforts to support capacity building in Georgia’s behavioral health system and supported the State of Arkansas’ efforts to encourage fiscal sustainability in rural hospitals.
- **Program Manager Sheena Gordon-Roberts** has over 20 years of experience, leveraging insightful analysis to positively impact private and public sector clients’ financial and strategic goals. She specializes in government efficiency and financial management transformation. Ms. Gordon-Roberts has conducted several state and local efficiency reviews focusing on cost reduction, revenue enhancement, and improved taxpayer outcomes. Her financial management transformation engagements have covered a range of approaches including process and policy improvements, enhancing internal controls, debt service accounting, organizational structure, employee training, and performance management.
- **Deputy Program Manager Michael Potter** has over 15 years of experience in public sector financial management. He specializes in leveraging data-driven insights to enhance efficiency, accountability, and operational effectiveness for clients. Mr. Potter has led transformative improvement initiatives across state and local government agencies, including several transportation organizations, with expertise spanning finance, operations, human resources, and IT systems, making him a valuable asset in driving impactful solutions.

- **DOT Evaluation Lead Sarah Comstock** has 15 years of experience in public sector consulting and specializes in organizational evaluation and transformation, designing and implementing targeted solutions to improve operational effectiveness and efficiency, and proactively managing change across stakeholder groups. Ms. Comstock led three large scale organizational assessments and organizational design efforts across the U.S. Department of Transportation (DOT). For these engagements, she led multiple teams to conduct current state assessments, identify efficiency and effectiveness gaps, and design organizational change recommendations. She also brings extensive experience conducting resource modeling efforts at multiple federal agencies seeking to better understand their staff resources and anticipate demand.
- **DHS Evaluation Lead Jon Schneider** has over 12 years’ experience performing studies, analysis, and execution in operational efficiency efforts across state and federal government organizations. Mr. Schneider specializes in performance management, internal controls, process improvement, and organizational assessment across homeland security and defense organizations.
- **DoHS Evaluation Lead Connor Ginsberg** has over 8 years of experience leading and delivering efficiency efforts and strategic planning for healthcare organizations. He has led teams in performing data analysis, financial analysis, strategic planning, and project management for statewide efficiency efforts. He led efforts to identify, track, and monitor critical child welfare related metrics that were used to inform strategic decisions made by Executive Leadership as part of A&M’s work with the State of Oregon’s Department of Child Welfare. Led strategic sourcing workstream aimed at simplifying Wyoming’s supply chain as part of multi-agency review to identify opportunities to both reduce expenses and drive incremental revenue.

We are confident that our team, leaning on A&M’s broad network of resources, exemplifies our firm’s commitment to delivering high-quality, hands-on results rapidly, empowering the State of West Virginia to achieve and exceed its strategic and operational goals.

2.0 About Alvarez & Marsal (RFP 4.5)

In 1983, Tony Alvarez II and Bryan Marsal founded A&M to provide radically different advice and hands-on support geared toward organizations facing mission-critical operational and financial hurdles—situations demanding leadership, action, clarity, objectivity, and results. They combined their skills and experience in public accounting and financial crisis environments and paved the way for a new specialty area: turnaround management, crisis management, and performance improvement for companies and governments for the benefit of their stakeholders and constituencies.

A&M has repeatedly been called to solve some of the world’s most complex financial and operational problems during immense pressure. We worked on the recovery of the New Orleans Public Schools after Hurricane Katrina and managed the bankruptcies of Lehman Brothers and the cities of Stockton and Detroit, among others. In each instance, A&M transcended challenging situations to deliver results on behalf of our clients. With over 10,000 employees, A&M has the depth and breadth to address operational and organizational transformations to improve service delivery

Alvarez & Marsal Company Profile	
Year Founded:	1983
Headquarters:	New York, NY
Officers / Co-CEOs	Tony Alvarez II & Bryan Marsal
Number of Employees:	Over 10,000
A&M Public Sector Services Founded:	2003
Clients Served:	Over 400 Public Sector clients at state, local, and federal levels
Public Sector Offices:	Washington, DC, Seattle, Houston, Kansas City, Dallas
Public Sector Officers:	Erin Covington, Co-CEO Peter Urbanowicz, Co-CEO James Chvatal, Chief Risk Officer

and financial improvement strategies. In doing so, A&M emphasizes solutions that achieve operational excellence through sound governance structures and essential stakeholder engagement.

Within this corporate structure A&M provides a full breadth of management consulting and professional advisory services. The figure below highlights our industry focus areas and services. Within this corporate structure, Alvarez & Marsal provides a full range of management consulting and professional advisory services. **Figure 1** displays our industry focus areas and services.

Figure 1: Overview of A&M Services



Alvarez and Marsal Public Sector Services (used interchangeably in this proposal as A&M) is a wholly owned subsidiary of Alvarez and Marsal Holdings. Founded in 2003, A&M Public Sector Services works with state and local governments to deliver improved operations at lower costs, improve citizen services, and support financial innovation. A&M Public Sector Services has several affiliate organizations across industries and functional specialties. The subject work for the Office of the Governor of West Virginia will be performed by A&M Public Sector Services, a distinct and separate business unit from its affiliates. As needed, A&M Public Sector Services can draw experts and personnel from its affiliate organizations to support client needs. In those circumstances, affiliate personnel are required to adhere to Public Sector Services policies and regulations. **Figure 2** provides an overview of A&M’s corporate organizational structure.

Figure 2: A&M’s Organizational Structure



A&M has a proven track record of delivering cost savings, improving operations, and enabling state organizations to improve service delivery to their constituents.

Table 1: Demonstrates a sampling of A&M's experience enabling efficiency and effectiveness outcomes for large organizations.

Efficiency Experience	Results of A&M's Work
State of Wyoming	Identified savings and revenue enhancement opportunities ranging from \$112.5 million to \$227.6 million.
State of Louisiana	Uncovered 72 efficiency, cost savings, and new revenue opportunities exceeding \$2.7 billion.
State of Kansas	Identified 105 efficiency, cost savings, and new revenue opportunities exceeding \$2.0 billion.
State of Rhode Island	Identified potential savings opportunities totaling \$65.7 million.
State of Oklahoma	Modernized the Department of Motor Vehicles (DMV) to improve service delivery and achieved over \$5M in cost savings/revenue generation within six months. Estimated future annual savings of \$2.1M by moving to a new technology architecture based on commercial broadband and VPN access rather than legacy intranet.
United States Postal Service (USPS)	Performed an independent assessment in pursuit of cost reductions and revenue opportunities which led to the identification of \$2.6 billion in annual savings.

A&M has the necessary domain expertise and experience to successfully complete this effort for the Governor's Office.

Table 2: Demonstrates a sampling of A&M's experience with relevant organizational types.

Relevant Organization	Organization	Brief Description and Results
DHS	Oklahoma Department of Corrections	Conducted a complete performance review that assessed potential service overreach and analyzed operational efficiency, leading to \$30M in savings identification.
DHS	Puerto Rico Department of Public Safety	Reformed processes and optimized technology to generate \$20M in cost savings.
DoHS	New Hampshire DHHS Efficiency	Assessed DHHS' operations and programs and implemented improvements across the enterprise to enable more effective service delivery across Behavioral Health, Medicaid, LTSS, and child-welfare.
DoHS	Oregon Department of Early Learning and Care (DELIC)	Established a new agency by integrating programs and resources from the Department of Education, Department of Human Services, and Bureau of Labor & Industries, ensuring seamless transition for ~300 employees, 23,000 families, 3,800 licensed facilities, and 100,000 professionals.
DoHS	Virginia Department of Health (VDH)	Transformed VDH's finance and grants management processes and built capacity to sustain process improvements with a focus on empowering the public health mission.
DOT	Massachusetts Bay Transit Authority (MBTA)	Enabled MBTA to restore service to full capacity following the pandemic and enhanced federal funding by eight percent.
DOT	Puerto Rico Highway and Transportation Authority (PRHTA)	Developed the agency's fiscal plan and budget, leading to a reduction in its \$6B outstanding debt.

A&M's Public Sector Services team believes in the ability of state and local governments to empower people to live their best lives. Our team leaders are recognized experts in person-centered practices, and these values are instilled across our staff. Unlike traditional consulting firms focused only on reporting and making recommendations, A&M partners with state agencies to plan, implement, execute, evaluate, and refine. We build a stronger and sustainable foundation for state governments to have a positive and meaningful impact on the lives of their constituents and do so in a cost-efficient manner.

3.0 Why A&M?

Our extensive experience working with other states, municipalities, and private and public organizations to transform their organizations provides an unparalleled perspective in identifying and executing opportunities for increased efficiency and effectiveness across the evaluated cabinet agencies. Our team combines individuals who were previously government or corporate operators and best-in-class consultants, which enables us to propose solutions that are practical, implementable, and avoid common pitfalls.

This proposal demonstrates our qualifications, experience, and capabilities to assist the Governor’s Office with this critical initiative. Our proposal’s key features are included in **Table 3**.

Table 3: Team A&M Proposal Key Features

Features	Benefits to West Virginia	Proof Point
Restructuring Heritage with a Focus on Efficiency and Bottom-Line Results	For over forty years, A&M has supported organizations in reducing costs, enhancing revenues, and improving operations while maintaining quality service and customer outcomes. From our DNA as a restructuring firm, we bring a proven formula for driving sustainable efficiency assessment outcomes. While assessments are a critical piece of our work, they are not sufficient. Our greatest impact comes when we work side-by-side with our clients to implement priority initiatives, putting our clients on the path to lasting transformation.	<ul style="list-style-type: none"> • Ranking as a global Vault top 3 consulting firm • Ranking as the 2024 Best Deal Advisory Firm by Private Equity Wire • Ranking as the number 1 turnaround advisor by The Institute for Turnaround • Winning restructuring team of the year from the Finance Community Awards
Experience Driving Impact Through Modernization	At A&M, we do not approach modernization as a technology-first exercise. Instead, we treat it as a disciplined strategy to unlock structural cost savings, maximize return on investment (ROI), and deliver clear value for money. Our approach is centered on enhancing efficiency and optimizing resources without resorting to layoffs. Our work with transportation systems exemplifies the fact that artificial intelligence and emerging technologies, when applied thoughtfully, can drive measurable financial improvement by eliminating inefficiencies, optimizing resource deployment, and expanding self-generated revenues. For West Virginia, our approach focuses on developing a pragmatic path to fiscal sustainability and long-term operational excellence.	<ul style="list-style-type: none"> • For New Hampshire, we have helped the DHHS strategically plan and begin to execute a modernization of their MMIS, embracing business goals first and employing best practices for Medicaid Enterprise Systems. • For the State of Wyoming, identified savings and revenue enhancement opportunities ranging from \$112.5 to \$227.6 million without proposing layoffs. • For the State of Louisiana, provided a final report that contained 72 efficiency, cost savings, and new revenue opportunities exceeding \$2.7 billion for the State over five years. • For the State of Rhode Island identified potential savings opportunities totaling \$65.7 million.
Experience supporting State and Federal Homeland Security, Transportation, and Health organizations	A&M brings demonstrated domain expertise having supported Federal Homeland Security, Transportation, and Health organizations at the State and Federal level. With this combined experience as strategic partners to States and the Federal Government, our team brings a comprehensive understanding of the challenges that the State of West Virginia faces and the skills to solve them.	<ul style="list-style-type: none"> • For the State of Rhode Island identified potential savings opportunities totaling \$65.7 million, including opportunities within Agency of Health and Human Services and Agency of Transportation • Supported the Massachusetts Bay Transportation Authority (MBTA) address financial and operational challenges following COVID-19 Pandemic • Key Personnel have deep experience supporting U.S. Department of Homeland

Features	Benefits to West Virginia	Proof Point
		Security improve operations and increase efficiency. <ul style="list-style-type: none"> • A&M has supported transformative efforts in health and human service programs in over 30 states.
We bring speed-to-execution	Providing access to necessary healthcare is a critical issue and we will provide West Virginia with actionable recommendations as quickly as possible so that government leadership can enact the decisions rapidly	<ul style="list-style-type: none"> • A&M empowers Managing Directors to deploy needed resources to a project from our 9,000+ global team of partners and staff. • A&M has experience bringing staff quickly to State & Local governments, including staffing over 100 resources to Puerto Rico and 80+ resources to Rhode Island during the response to the COVID-19 pandemic

4.0 Technical Approach

4.1. Our Understanding

West Virginia stands at a pivotal moment, one defined by a shared commitment to serve residents more effectively through transparent, efficient, and resilient government operations. Under Governor Morrissey’s leadership, the State has launched a cross-departmental evaluation that signals a clear intent to uphold public trust and deliver measurable value across essential public services. This performance review, led by the Office of the Governor, reflects not only a statutory obligation but a broader mission to modernize the operations of the Department of Human Services (DoHS), Department of Homeland Security (DHS), and Department of Transportation (DOT). Each of these agencies plays a distinct role in advancing the well-being, safety, and mobility of West Virginians. Yet, they also share common challenges, such as rising costs, complex mandates, and the need to meet growing public expectations with limited resources. A&M recognizes this moment as more than an audit; it is a strategic opportunity to realign systems and structures around outcomes that matter most to residents.

For the Department of Human Services, the opportunity centers on transforming care delivery and support systems for the state’s most vulnerable populations. The department is advancing commendable efforts in child welfare, mental health, and maternal health, with initiatives like trauma-informed care models, Summer EBT, and WV Wraparound. At the same time, structural pressures including rising demand, public health threats, and future changes in Federal funding for Medicaid, SNAP, and childcare threaten the long-term sustainability of these services. A&M understands the importance of identifying areas where value is not currently being realized, and to surface operational, organizational, and funding models that enable DoHS to do more with less while safeguarding essential outcomes for children, families, and communities. This includes exploring opportunities to better coordinate programs, such as leveraging federal funding streams like Medicaid for behavioral health and child welfare services, and identifying efficiencies across overlapping provider groups and similar services to maximize impact and administrative efficiency.

For the Department of Homeland Security, the challenge is navigating a dynamic threat environment while ensuring operational readiness across public safety, emergency response, and coordination with federal partners. The department faces multi-dimensional threats, from violent extremism and cyber intrusion to drug trafficking and human exploitation. Its charge is complicated by evolving technologies, high migration volumes, and the need for stronger coordination across agencies. The department is taking steps to enhance preparedness and resiliency, but strategic improvements in resource deployment, information sharing, and response coordination are vital. A&M brings experience working with governments to integrate risk-based decision-making, enabling more agile and responsive homeland security operations aligned with 21st-century risks.

For the Department of Transportation, West Virginia’s infrastructure transformation is at an inflection point. Decades of underinvestment are being addressed through ambitious repaving and bridge repair programs; efforts that have yielded measurable gains. Yet, rising construction costs, aging infrastructure, and declining fuel tax revenues place long-term system health at risk. At the same time, evolving transportation demands from highway congestion to automation and safety necessitate forward-looking investments. The administration’s focus on fiscal stewardship, debt management, and multimodal integration reflects the seriousness of the moment. A&M sees a critical opportunity to help DOT assess where performance gaps remain, where efficiencies can be gained, and how to ensure infrastructure investments align with both near-term performance targets and long-term strategic resilience.

Drawing on A&M’s extensive experience conducting performance audits for various states, we recognize the importance of tailoring our assessment not only to the unique characteristics of each state but also to the specific functions of each Department. We bring subject matter experts (SMEs) with specialized knowledge in Transportation, Human Services, and Homeland Security. Their insights inform our recommendations and drive the performance improvements detailed in our report. Error! Reference source not found. outlines initial considerations our team uses to tailor our analysis and recommendations our for West Virginia’s Departments.

Table 4: A&M’s initial considerations and experience are used to tailor our assessments to each department

Agency	Key Considerations
Department of Human Services	<ul style="list-style-type: none"> • Year-over-year growth / changes in program enrollment and service costs • Capacity in key program functions such as eligibility • Use of Medicaid funding in related HHS programs (Behavioral Health, Child Welfare, etc.) • Waiting lists and other indicators of unmet need • Impact of federal funding changes on core programs (e.g., SNAP, Medicaid, childcare, etc.) • Effectiveness of service models • Operational efficiency and service delivery alignment • Administrative efficiency and allocation of costs across programs • Compliance with evolving federal and state regulations • Status of the DHHR split on January 1, 2024, into the Department of Health, Department of Health Facilities, and Department of Human Services
Department of Homeland Security	<ul style="list-style-type: none"> • Readiness to respond to evolving threats (e.g., violent extremism, cyberattacks) and natural disasters • Coordination across emergency management, law enforcement, and federal partners • Effectiveness of efforts to combat trafficking, drug smuggling, and other public safety and security priorities • Cybersecurity and critical infrastructure protection, hardening, and improvement capabilities • Clarity of governance and internal accountability processes and mechanisms to support swift, coordinated action • Processes for public communication and risk messaging related to natural disasters • Approaches for continuity of government and resource delegations for continuity planning, authority delegation, and operations readiness
Department of Transportation	<ul style="list-style-type: none"> • Public-private partnership development, due diligence, and performance oversight etc. • Assess maintenance scheduling, crew deployment, vehicle utilization, and overall asset optimization to improve service efficiency and reduce costs. • Sustainability of funding sources and financial planning, including long-term funding strategies like reliance on fuel tax revenue, use of debt instruments, and the agency’s ability to access federal programs such as Transportation Infrastructure Finance and Innovation Act (TIFIA) loans and infrastructure grant • Reviewing structure and performance of tolling operations along the West Virginia Turnpike (e.g., toll-by-plate systems, variable tolling, optimization of toll booth staffing and technology) • Project prioritization, delivery, and impact on congestion and safety • Condition and maintenance of roads and bridges

	<ul style="list-style-type: none"> • Adoption of emerging technologies (e.g., Intelligent Transportation Systems, automation, high speed cameras, variable tolling) • Coordination of planning and responsiveness of emergency operations, including coordination with local law enforcement and first responders • Transportation planning and consolidation across agencies • Strategic sourcing and procurement practices assessment
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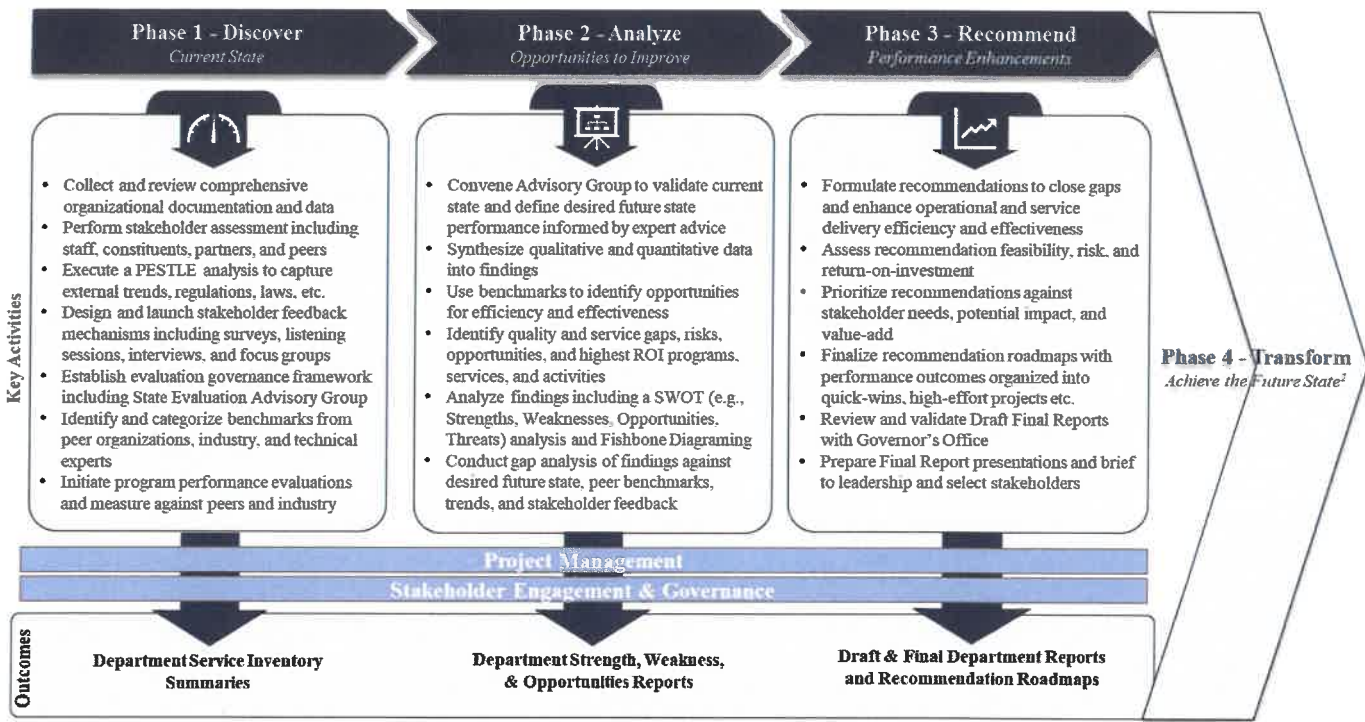
4.2. *Our Approach*

A&M’s thorough and hands-on approach to organizational performance evaluation and audit goes beyond mere advice. We actively guide decision-making with a holistic perspective, facilitate seamless execution across various domains, and deliver tangible results that align with our clients’ strategic goals and external drivers. This delivery philosophy and approach has been developed based on A&M’s corporate restructuring heritage and refined through more than twenty years of partnering with public sector clients to solve their most complex challenges.

Our goal is to provide the Office of the Governor of The State of West Virginia- with fact-based, actionable recommendations that position the state for meaningful and sustainable transformation. We accomplish this by conducting rigorous data collection, root-cause analysis, and stakeholder engagement to inform our understanding of pain points and opportunities to improve. We bring SMEs across the three Department domains of human services, homeland security, and transportation as well as practitioners seasoned in conducting efficiency and effectiveness audits for the benefit of stakeholders and citizens. The breadth and depth of our expertise, experience, and bias for action enables us to rapidly understand, diagnose, and recommend performance improvements for the state and its constituents.

A&M’s four-phased organizational performance evaluation and audit methodology – **Discover, Analyze, Recommend, and Transform (DART)** – has been tested and honed across countless engagements in both the public and private sector. Though A&M teams have extensive experience supporting other states with similar performance audits, our approach in **Figure 3** is specifically tailored to the distinct needs of West Virginia and the requirements outlined in the Request for Proposal (RFP).

Figure 3: The A&M’s DART methodology guides the team to rapidly discover the current state, pinpoint improvement opportunities, and recommend performance enhancements that drive impactful decisions



Collaboration with the Governor’s Office, staff, partners, and constituents is crucial to the success of our approach. We engage in active listening, consistently document and validate feedback, and proactively report progress so that outcomes accurately reflect West Virginia’s priorities and avoid any surprises. Using project management best practices, we drive an accelerated execution to maximize available resources, limit strain on West Virginia leadership and staff, and deliver actionable recommendations that can inform timely leadership decision making. Below is a summary of each phase, detailing how each phase aligns with the mandatory requirements and goals outlined in the RFP. This approach is applied concurrently to each Department.

- **Phase 0 – Initial Data Call:** Before launching the formal assessment, we initiate a structured data call to collect foundational materials necessary to support a rapid and accurate current-state analysis in Phase 1. This includes, but not limited to, requesting organizational charts, staffing rosters, financial reports, performance dashboards, policy manuals, regulatory guidance, program descriptions, IT system inventories, and recent audit findings. We work closely with each Department’s designated points of contact identified in the project kick-off to ensure timely access to relevant data while minimizing disruption to daily operations. This initial effort sets the stage for a thorough and efficient assessment by enabling early identification of information gaps, tailoring stakeholder engagement strategies, and aligning the Phase 1 workstreams to department-specific priorities and contexts.
- **Phase 1 – Discover:** Rapidly document each Department’s structural, operational, financial, regulatory, and technical current state; perform PESTLE (Political, Economic, Social, Technological, Legal, and Environmental) analysis; and capture benchmarks from peer agencies, industry, and technical experts. Initiate program evaluations to understand performance, fairness, and efficiency. Understand the stakeholder landscape and design messaging and modes to strategically engage a broad spectrum of stakeholders to collect key insights on strengths,

weaknesses, and opportunities to realize efficiencies, improve quality, and enhance effectiveness. Phase 1 results in a comprehensive inventory of core Departmental resources, positions and skills, services and programs, technological tools and capabilities, policies and procedures, and applicable compliance requirements. (**Mandatory Project Requirements 4.4.1, 4.4.3, 4.4.4, 4.4.5, 4.4.6 / Goals 4.3.2 and 4.3.7**)

- **Phase 2 – Analyze:** Conduct analysis across quantitative and qualitative data and information to produce findings and identify gaps, risk, and performance improvements. Convene a leadership steering committee to validate the current state and define desired future state performance informed by benchmarks and expert advice. Drive ongoing stakeholder outreach through target communications to increase buy-in for future recommendations. Produce comprehensive gap analyses against benchmarks, performance goals, and stakeholder needs and expectations to inform recommendations. (**Mandatory Project Requirement # 4.4.1 – 4.4.5, 4.4.10, 4.4.11 and Goals # 4.3.1 – 4.3.8, 4.3.10**)
- **Phase 3 – Recommend:** Design gap closing recommendations tied to root cause challenges and capitalize on strengths. Conduct various analyses (e.g., feasibility, ROI, change impact, etc.) on recommendations to inform prioritization decision making. Validate draft recommendations and prioritization criteria with steering committee and design recommendation implementation roadmaps for each Department. Produce clear, comprehensive, and engaging reports and share drafts with the Governor’s Office, incorporate feedback and finalize. (**Mandatory Project Requirements 4.4.8/4.4.8.1, 4.4.9, 4.4.10 and Goals #4.3.4/4.3.5**)

Throughout the project, our team takes an iterative approach by providing regular status updates and preliminary recommendations for the State’s consideration (**RFP Mandatory Requirement 4.4.7**). The nature and frequency of these updates are detailed through the below technical section and are confirmed with the State during the project kick-off. In addition, our team confirms compliance with all current and future policies of the Department and the West Virginia Office of Technology (WVOT) (**RFP Mandatory Requirement 4.4.11**).

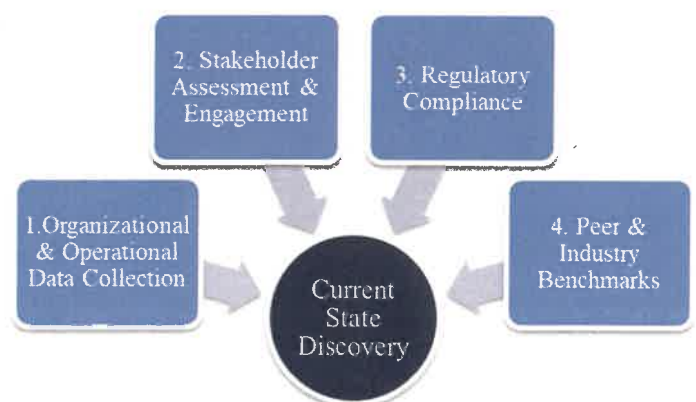
4.3. Phase 1 – Discover

The **Discovery Phase** encompasses four critical areas of information gathering: 1) Organizational Data Collection, 2) Stakeholder Assessment, 3) PESTLE Analysis, and 4) Peer and Industry Benchmarking. Below is an overview of the A&M teams’ support for each area:

1. Organizational & Operational Data Collection

Collection: This step begins in Phase 0 and continues into Phase 1 - Discovery as needed. We launch a comprehensive data collection effort (**Requirement #4.4.4**) to capture all relevant information necessary for an accurate analysis of each department’s current state. This includes organizational charts, functional statements, position descriptions, skills and competency frameworks, program charters and service catalogs, policies and procedures, process documentation, IT capabilities and systems, compliance requirements with federal and state laws, regulations, statutes, administrative rules, background reports and studies, existing performance metrics, and constituent satisfaction data.

Figure 4: A&M's Discovery efforts focus on four key areas



Efficient and effective data collection is paramount to the successful execution of the evaluation. A&M is equipped with ready-to-use data collection templates, trackers, and messaging tools that enable swift information gathering from key stakeholders. Additionally, to limit the burden on staff, we collect all publicly available information, including published reports, strategic plans, press releases, budgetary materials, and relevant laws and regulations. As data and documentation are received, we inventory and triage the content and quality, taking steps to fill gaps through follow-ups and supplemental research. Our team then categorizes data into the appropriate evaluation domains.

2. **Stakeholder Assessment & Engagement:** Simultaneously, we employ a structured and comprehensive approach to gather and analyze stakeholder feedback (**Requirement #4.4.5**). Our process begins with an assessment to identify all relevant stakeholders, including staff, partners, constituents, and other state departments. We validate stakeholder groups and lists with Department leadership and create stakeholder maps to categorize stakeholders based on their influence, interest, service use, and impact on the Departments being evaluated. The A&M team develops detailed plans to optimally engage stakeholders through various methods such as questionnaires, surveys, interviews, focus groups, and workshops. Key steps include:
- **Stakeholder Identification and Mapping:** Create Department-specific stakeholder maps to identify and categorize stakeholders.
 - **Development of Engagement Tools:** Design structured questionnaires and interview guides tailored to capture specific insights on service quality, organizational structure, reporting relationships, and areas for improvement.
 - **Launch Stakeholder Feedback Instruments:** Craft tailored outreach communications and identify effective means to solicit and administer questionnaires/surveys and hold focus groups/interviews. In addition to online modes such as emails, this may also include points of service (i.e., health clinics, DMV offices, and emergency response centers, etc.).
 - **Conduct Analysis:** Apply appropriate analyses to understand information gained, such as thematic analysis, root cause analysis, trend analysis, and statistical analysis. Use findings to further inform A&M's technical analyses outputs in Phase 2.

With this crucial understanding of the stakeholder landscape, we also design and implement a strategic communication plan using a RACI (i.e., Responsible, Accountable, Consulted, and Informed) matrix as a guide to share ongoing, appropriate, and timely information and updates on project progress (**Requirement #4.4.6**).

Finally, to guide the evaluation process, A&M recommends establishing a West Virginia Evaluation Advisory Group composed of key leaders from the Governor's Office and Departments. This body serves as a sounding board and steering group driving decisions are grounded in both the States's operational realities and public value. A&M engages the Advisory Group for the following key activities:

- Facilitating working sessions to validate underlying assumptions, inform operational interdependencies, review and validate current state findings, and craft desired future state performance.
- Establishing evaluation criteria to assess recommendations based on financial impact, strategic fitness, implementation feasibility, risk, and required investment.
- Scenario modeling and phasing to test how groups of initiatives can be sequenced for early wins, risk mitigation, and organizational readiness.

- Advisory Group Checkpoints to socialize preliminary findings, secure feedback, and align expectations for the final roadmap.

A&M’s approach emphasizes shared governance, structured stakeholder engagement, and alignment with West Virginia’s strategic priorities. Rather than submitting a static set of recommendations, we work shoulder-to-shoulder with West Virginia’s leadership to shape tailored, feasible, and actionable recommendations founded on structured analysis.

3. **Regulatory Compliance:** To gain an understanding of the regulatory landscape and all federal and state laws, statutes, and administrative rules we gather all applicable regulations and rules for each Department and develop a compliance matrix to align departmental policies, procedures, programs, etc. Using this matrix, we either confirm compliance or identify gaps. (**Requirement #4.4.2**).

To add a more robust picture to the external factors impacting West Virginia, we then conduct a PESTLE analysis which provides a holistic view of the State’s and each Department’s operating environment as well as industry trends. We conduct academic research and interviews with A&M industry SMEs to address PESTLE questions like those listed in **Table 5** below.

Table 5: Sample PESTLE Analysis Questions

Factor	Key Questions
Political	<ul style="list-style-type: none"> - Are there upcoming changes in government policies that could affect the organization? - How do government regulations and policies impact the industry?
Economic	<ul style="list-style-type: none"> - What is the current economic climate (e.g., inflation rates, interest rates, economic growth)? - What are the levels of employment and unemployment in the region?
Social	<ul style="list-style-type: none"> - What are the demographic trends (e.g., age, gender, income levels) in the region? - How does education and health impact the workforce and consumer base?
Technological	<ul style="list-style-type: none"> - What are the current technological trends and innovations in the industry? - Are there any emerging technologies that could disrupt the industry? - How does the organization’s technology infrastructure compare to industry standards?
Environmental	<ul style="list-style-type: none"> - What are the environmental regulations and policies that impact the organization? - How does the organization manage waste, energy consumption, and resource utilization?
Legal	<ul style="list-style-type: none"> - What are the relevant laws and regulations that impact the organization? - How does the organization ensure compliance with industry-specific regulations?

This comprehensive ecosystem view helps guide the formation of downstream recommendations to enable West Virginia to meet the needs of today and prepare for future changes and trends.

4. **Benchmarking:** In addition to the expertise and insights provided by our internal A&M practitioners, many of whom have previously served as state and local government leaders, we leverage A&M’s Insight Center to capture robust benchmarks (**Goals #4.3.2 and #4.3.7**) across Human Services, Transportation, and Homeland Security service delivery and operational performance. The A&M Insight Center provides insight into the efficiency (i.e., costs and staffing

The Insight Center is Alvarez & Marsal’s global research unit, dedicated to delivering research support, thought leadership and empirical studies to provide our practitioners and clients with fact-based, actionable insights. The group was founded to adhere to one of A&M’s founding principles: “No shooting from the hip.” The Insight Center team has diverse experience and skill sets ranging from quantitative analysis and data modeling to forecasting and automation to improve the efficiency and effectiveness of repetitive tasks.

levels) of the eight largest back-office functions (i.e., finance, human resources, information technology, marketing, procurement, sales/customer service, other administrative services) relative to median performing industry peers and other government agencies. We access information from a range of sources including, but not limited to the American Productivity & Quality Center (APQC), Data.gov, U.S. Bureau of Labor Statistics, etc.

During this phase, we determine the necessary types of benchmarks, categorize them into relevant domains, identify cross-cutting benchmarks applicable across multiple domains, and validate these benchmarks with the State Evaluation Advisory Board to ensure they align with the State’s strategy and performance goals. These benchmarks are then utilized in Phase 2 - Analyze, to compare and contrast West Virginia’s performance against that of its peers and industry, resulting in findings and opportunities for enhanced efficiency and effectiveness.

Our Discovery phase serves as the critical first step in building a performance-driven roadmap for the State’s agencies. This phase focuses on developing a clear, data-backed understanding of each agency’s current organizational structure, including procedures, systems, and resource allocations. By launching with a rapid diagnostic – including assessing programs against applicable federal and state laws, stakeholder engagement, and operational analysis – our team surfaces the highest-impact efficiency levers and savings opportunities. This phase concludes with the creation of **Department Service Inventory Summaries** at the division level that include the resources (i.e., staffing levels, budgets, etc.) allocated to each service (**Requirement #4.4.3**). Analyzing the current state lays the groundwork for a collaborative effort to prioritize improvements and build an actionable Implementation Roadmap.

4.4. Phase 2 – Analyze

After gaining a comprehensive understanding of each Department's current state, the A&M team proceeds with analyzing the data and synthesizing it into identified strengths and weaknesses, along with opportunities for improvement based on benchmarking and A&M SME guidance.

To set the stage for this phase, we first convene the State Evaluation Advisory Board to present and validate the current state and facilitate discussion and consensus on the desired future state. This underscores our belief that long-term transformation must be co-designed with those who will ultimately own and sustain it.

For each evaluation domain we utilize best-in-class analytical methodologies outlined in **Table 6** below. These methods were selected based on their ability to get to the root-causes of inefficiencies and areas of low value constituent services. The data collected as part of Phase 1 serves as a baseline for our analyses; however, A&M conducts supplemental stakeholder interviews and focus groups as needed during Phase 2 to refine the assessments across each domain.

Table 6: A&M's analytical methodologies are designed to conduct a comprehensive evaluation and deliver the insights necessary to provide strategic insights into positive changes.

Assessment Domain	Key Activities & Analysis
Org Structure, Procedures, Systems, and Resources (RFP 4.3.4, 4.3.5, 4.3.6, 4.3.8, 4.4.1, 4.4.3, 4.4.4, 4.4.5)	<ul style="list-style-type: none"> - Organizational Chart Mapping to assess management layers, spans of control, and reporting lines, producing visualizations that inform structural streamlining. - Role Rationalization to identify duplicative or unclear roles, resulting in recommendations to clarify responsibilities and improve efficiency. - Process Mining Driven by AI (or other tools deemed acceptable) to detect workflow inefficiencies, labor misalignment, and underutilized assets, generating a data-backed foundation for operational improvements. - Comparative Benchmarking of staffing ratios and management structure against peer agencies, providing insights into structural outliers and best practices. - Strategic Alignment Assessment to evaluate how well current structures and systems support agency missions, producing a gap analysis with prioritized improvement areas.

<p>Budgetary/Finance (RFP 4.3.1, 4.3.4, 4.4.3, 4.4.10)</p>	<ul style="list-style-type: none"> - Historical Budget Analysis to assess trends and identify misaligned or underutilized funding, resulting in targeted reallocation recommendations. - Alignment Assessment of budget allocations with strategic objectives and performance outcomes to identify funding mismatches or opportunities for investment. - Financial Controls Review to examine processes and reporting for risks or inefficiencies, producing control gap findings and suggested enhancements. - Benchmarking financial practices against similar agencies to highlight cost-saving opportunities and areas of financial underperformance.
<p>Technology (RFP 4.3.6, 4.3.10, 4.4.1, 4.4.11)</p>	<ul style="list-style-type: none"> - Inventory & Mapping of critical hardware, software, and infrastructure to identify current capabilities, dependencies, and redundancies for a comprehensive technology baseline. - User & IT Interviews to capture insights on system usability, unmet needs, and priorities, resulting in user-informed improvement opportunities. - Gap & Maturity Analysis using best-practice frameworks to assess performance across infrastructure, security, data, and integration domains, producing a modernization roadmap. - Technology Enablement Scan to identify potential for advanced tools (e.g., AI, RPA), generating a set of innovation-ready use cases. - Strategic Fit Review to assess alignment of current technologies with agency goals, resulting in prioritized technology investment recommendations.
<p>Regulatory Compliance (RFP 4.3.4, 4.3.5, 4.4.2, 4.4.4)</p>	<ul style="list-style-type: none"> - Regulatory Framework Mapping to compile and categorize all relevant laws, regulations, and mandates, producing a centralized compliance reference. - Policy & Document Review of critical materials to assess alignment with regulatory requirements, producing a gap matrix highlighting full, partial, or non-compliance. - Compliance Risk Assessment using a risk matrix to prioritize exposure areas, resulting in a risk-ranked set of compliance findings. - Legal Coordination (as needed) to validate interpretations and ensure accurate application of complex or ambiguous regulations.
<p>Program Evaluation (RFP 4.3.1, 4.3.2, 4.3.3, 4.3.6, 4.3.7, 4.4.5, 4.4.10)</p>	<ul style="list-style-type: none"> - Evaluation Framework Design to define questions and methods for assessing program effectiveness, producing a tailored evaluation plan. - Assess Program Performance, efficiency, and fairness using findings from Phase 1, producing evidence-based insights that highlight strengths, gaps, and opportunities for improvement. - Performance Metrics Review against best practices to identify outdated or misaligned indicators and propose improvements. - Findings Interpretation to draw conclusions that inform actionable recommendations for enhancing program quality, cost-efficiency, and impact.

Key to the conclusion of this phase is putting it all together into coherent findings of each Department’s strengths, weaknesses, opportunities, and gaps. We also look for commonalities and outliers across Departments that can inform potential cross-cutting gap-closing recommendations or opportunities to capitalize on bright spot practices, processes, or programs. To synthesize a holistic view of the analysis, we perform two main activities: (1) Department SWOT analyses and (2) Ishikawa Fishbone Diagramming, which is a Lean Six Sigma best practice (**Mandatory Qualification #4.5.2.1**). Below is a summary of how each is used:

1. **SWOT Analysis:** We conduct a thorough SWOT analysis for each department to identify internal strengths and weaknesses, as well as external opportunities and threats. This helps in understanding the current positioning and potential areas for improvement. The analysis is validated with the State Evaluation Advisory Board to ensure alignment with the State’s strategy and performance goals. (**Goal #4.3.6**)
2. **Fishbone Diagram:** For each identified weakness and threat, our team performs a deep dive into the root causes using Ishikawa Fishbone Diagramming. This method allows us to systematically explore and categorize potential causes of problems, ensuring a comprehensive understanding of underlying issues. The findings from this analysis are then used to develop actionable recommendations aimed at addressing the root causes and enhancing departmental performance.

Following the completion of the SWOT and Fishbone analyses, we create detailed **Phase 2 “Strengths, Weaknesses, and Opportunity Reports”** for each Department. These reports include a comprehensive gap analysis that highlights areas where current performance falls short of desired benchmarks and stakeholder and constituent needs. The gap analysis enables the formulation of targeted recommendations which are then evaluated and prioritized in Phase 3. By addressing these gaps, we aim to enhance the efficiency and effectiveness of each Department, aligning their organization, operations, and services with industry best practices and the long-term goals of the State of West Virginia.

4.5. Phase 3 – Recommend

Recommendations are only as helpful as they are practical, feasible, and designed to solve root-cause problems. During this phase, A&M evaluates recommendations against a series of criteria, works collaboratively with the State Evaluation Advisory Board to validate and prioritize, and formulates comprehensive Final Department Reports with implementation roadmaps, ownership, and performance measures. Our approach to finalizing recommendations includes three key steps:

1. **Define:** We determine the implementation costs for each gap-closing recommendation by assessing the level of effort, change impacts, and resource requirements. Additionally, we define the anticipated return on investment (ROI) in terms of both efficiency gains and value-adding effectiveness improvements. To do so, we quantify anticipated direct benefits (e.g., reduced processing times, lower operational expenses, etc.) and consider qualitative benefits (e.g., enhanced customer satisfaction, better compliance with regulations, increased innovation, etc.). This step provides a realistic understanding of the necessary inputs for successful implementation and the expected outcomes if the recommendations are effectively implemented. **(Goal #4.3.4/4.3.5)**
2. **Evaluate:** Based on performance criteria and benchmarks defined in collaboration with the Advisory Board, each initiative is ranked for implementation complexity, feasibility, stakeholder alignment, value-add, and strategic fit **(Goal #4.3.4)**. We also tie each recommendation to key trends in service delivery and benchmarked best practices with incremental performance indicators for continuous improvement **(Mandatory Requirement #4.4.10)**. This thorough evaluation makes certain that recommendations are practical, beneficial, and feasible within the existing organizational and regulatory framework.
3. **Prioritize:** Using A&M’s proven Risk-Based Prioritization (RBP) approach, we categorize recommendations into:
 - Quick Wins: Low-cost, low-risk actions that deliver early results.
 - Medium-Term Opportunities: Initiatives requiring moderate system/process changes.
 - Long-Term Transformations: High-impact efforts needing deeper investment and coordination.

Recommendations are grouped into domain-specific overarching initiatives and documented using A&M’s proprietary A&M Tracking and Logistics Automated System (ATLAS) management toolkit, capturing the business case, investment needs, risks, and performance metrics. This collaborative process equips State and Department leadership with a realistic, jointly developed roadmap that balances immediate impact with sustainable transformation.

The outcome of this phase is a Final Report and Implementation Recommendation Roadmap that reflects both analytical rigor, key trends from peers and industry, and current and future operational capacity. This plan includes:

- A finalized list of vetted recommendations.
- Implementation prioritization, sequencing, and phasing.
- Investment needs and ROI projections.
- Performance measures for success.

Our proprietary A&M ATLAS platform provides business intelligence on identified risks, performance issues, and task status.

A&M ATLAS provides our teams and clients with KPIs through innovation and agility to report, track, and manage project charters, work breakdown structures, resource allocation, schedules, timelines, risk management, and innovation management.

To produce the reports, A&M meets with the Governor’s Office to present the executive summary and three Departmental draft reports, solicit feedback, and address questions. We then complete the reports, in a consistent format with a focus on comprehensiveness, readability, plain-language, visual aids, and balance. Each final report includes background information, ecosystem trend analysis, a review of project findings, and proposed recommendations tied to identified weaknesses or problems. The Implementation Roadmaps provide sequenced time-based action plans that clearly identify owners and anticipated performance indicators (**Mandatory Requirement #4.4.8**). The finalized report remains confidential, with publishing rights solely within the authority of the West Virginia Governor's Office (**Mandatory Requirement #4.4.8.1**).

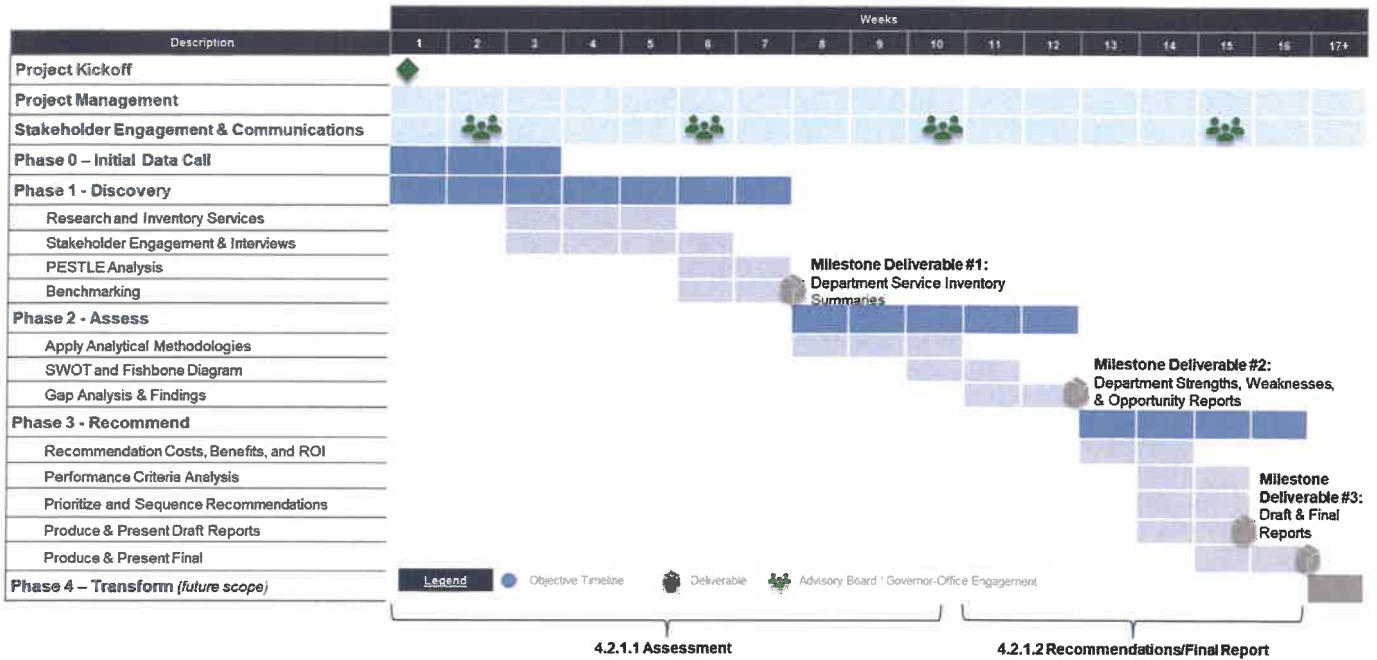
Throughout this engagement, A&M prioritizes transparency, dialogue, and responsiveness to West Virginia’s needs. To do so, we prepare supporting presentations and communications with the appropriate level of information for each stakeholder group to share the findings and recommendations (**Mandatory Requirement #4.4.9**). We recognize that the most effective solutions are not only technically sound – they are institutionally supported, realistically resourced, and built through trust. Our role is to help West Virginia navigate tradeoffs, ensure alignment with regional and board expectations, and deliver a Final Report and Implementation Roadmap that State leaders are confident to own.

4.6. Project Schedule

Our proposed project schedule (**Figure 5**) is designed to drive efficient and effective execution of the performance evaluations across the three departments: Transportation, Human Services, and Homeland Security. All teams run concurrent efforts, utilizing centralized project management tools and trackers and knowledge management activities to maintain alignment and consistency. We hold weekly team meetings to review progress, identify risks, discuss mitigations, and drive consistent quality across all three efforts. This structured approach allows us to deliver timely and comprehensive evaluations while maintaining high standards of performance and accountability.

The proposed project schedule is reviewed during the kickoff meeting and adjusted based on any considerations shared by the State. Following, we finalize the timeline and build detailed work breakdown project plans to accomplish the detailed activities for each schedule task.

Figure 5: A&M’s Proposed Project Schedule



5.0 Qualifications & Experience

5.1. A&M’s Expertise, Resources, Capacity, Capability, and Experience (4.5.1.1)

Our proposal demonstrates that A&M has the necessary expertise, resources, capacity, capability, and experience to successfully deliver on the Office of the Governor’s desired outcomes. We have conducted numerous efficiency and effectiveness reviews over the past several years, cumulatively saving state governments billions of dollars and enabling those states to improve constituent services. A&M has the capacity to deliver successful outcomes for this project. We have access to thousands of highly qualified personnel with experience in delivering similar services for commercial and government clients. The following sections further detail our firm’s features that enable us to deliver results for the State of West Virginia.

5.2. A&M’s Experience Delivering Similar Projects and References (4.5, 4.5.1.2)

Throughout our long history of supporting government and non-profit organizations with operational assessments, A&M has driven transformational results for hundreds of clients to improve operations, financial transparency, reduce costs, and better deliver constituent services.

For this specific opportunity with the State of West Virginia, we demonstrate deep expertise in efficiency and effectiveness reviews, leading to improved statewide operations and reduced costs. Our experience demonstrates that we exceed the RFP minimum requirements for experience conducting similar initiatives, and that work was conducted for similarly sized and situated states. The table below summarizes a subset of our experience in performing similar work. **As a standard part of our reviews, we apply industry standards and benchmarks as part of our approach and would use our experience and expertise in similar efforts to achieve that outcome for West Virginia.**

Following the table below, we have provided a detailed narrative on each illustrated project, demonstrating our success and experience in providing services that align with this project’s scope.

Aligned Experience	#1 Wyoming Statewide Efficiency Review	#2 Louisiana Government Efficiencies Support	#3 Kansas Operational Efficiency Assessment	#4 Rhode Island Efficiency Review	#5 New Hampshire Efficiency Assessment	#6 Oregon Child Welfare Transformation
Project Goals						
Performance and Operations (4.3.1)	✓	✓	✓	✓	✓	✓
Industry Standards and Best Practices (4.3.2)	✓	✓	✓	✓	✓	✓
Program Assessments (4.3.3)	✓	✓	✓	✓	✓	✓
Operations Improvement (4.3.4 & 4.3.5)	✓	✓	✓	✓	✓	✓
Strengths and Weaknesses Assessment (4.3.6)	✓	✓	✓	✓	✓	✓
Comparable Benchmarking (4.3.7)	✓	✓	✓	✓		✓
Organizational and Staff Assessment (4.3.8)	✓	✓	✓	✓		✓
Develop and Adhere to Project Schedule (4.3.9)	✓	✓	✓	✓	✓	✓
Technology Assessment (4.3.10)	✓		✓		✓	

Experience 1: Wyoming Statewide Efficiency Review

Client Organization	Office of the Governor of Wyoming
Project Information	Location: Cheyenne, WY Value: \$298,500 Duration: August 2017 – November 2017 Contact Information: Michelle Panos, Policy Advisor, Office of the Governor (307) 777-8784 michelle.panos@wyos.gov
Project Description	
The State of Wyoming faced revenue declines driven by decreases in mineral tax revenue. As a result, the FY2017-2018 budget was balanced with approximately \$200 million in one-time reserve fund transfers. The state established a Spending and Government Efficiency Commission (“the Commission”) to address the financial concerns. A&M was contracted to	

Experience 1: Wyoming Statewide Efficiency Review

conduct a comprehensive rapid assessment to identify, quantify, and prioritize new approaches for the Commission that would pinpoint opportunities to reduce costs and operate more efficiently, or to reduce overlapping or obsolete programs.

Project Approach & Outcomes

Key Tasks:

- Conducted a cross-agency benchmarking analysis and engaged with agencies that had statewide functions, including Retirement Services and the State Construction Agency, to identify recommendations that would impact efficiency for the state overall.
- Reviewed plans submitted by agencies with more than \$20 million in biennial budget to identify actionable efficiency opportunities.
- Identified ways to incentivize the identification of efficiencies by state employees.
- Interviewed agency leaders and supporting staff for the key assessment areas to understand processes and challenges to document observations and develop efficiency recommendations.

Outcomes:

- The final report for the State Efficiency Study identified savings and revenue enhancement opportunities ranging from \$112.5 million to \$227.6 million.
- Our broad scale organizational review included:
 - Programmatic review of the lines of service provided by the state agencies.
 - Assessment of the span of control and reporting structure of the supervisors.
 - Review of opportunities to make changes to both the employee benefits and school district benefit programs to drive savings.
- Systems modernization and coordination of investment across state agencies to allow for better integration of technology solutions, particularly in the areas of Human Resources and Finance.
- Increasing revenues through the creation of a Governor’s Grants Office to improve the pursuit of Federal Funds, creating an interagency Discovery Unit for tax audit and collections, and hiring audit and collections staff.
- Implementing shared services across state agencies and regional shared services across school districts to coordinate administrative functions performed at the agency level, increasing the level of service and helping to drive efficiency.
- Enhancing employee benefits through the creation of school district benefit plans, additional wellness options and programs, and opportunities to incentivize employees to identify efficiency initiatives.

Experience 2: Louisiana Government Efficiencies Support

Client Organization

Louisiana Division of Administration (DOA)

Project Information

Location: Baton Rouge, LA
 Value: \$2.5M
 Duration: December 2013 – September 2014
 Contact Information:
 Jan Cassidy, Former Assistant Commissioner of Procurement and Technology,
 DOA
 (225) 250-1027
 jan@cassidyconsultingllc.com

Project Description

A&M was contracted by the State of Louisiana DOA to undertake a government efficiency review for nine cabinet agencies. The Government Efficiencies Management Support (GEMS) project’s main goal was to identify an average of \$500 million annually and \$2.7 billion over five years in cost savings from state government operations.

Project Approach & Outcomes

Key Tasks:

Experience 2: Louisiana Government Efficiencies Support

- Conducted a mandates and performance analysis referred to as a “Line of Service” catalog review for all agencies under the scope.
- Conducted a bottoms-up study of the in-scope agencies and offices by:
 - Expanding already successful programs
 - Maximizing federal funding
 - Improving internal performance
 - Preventing fraud and abuse
 - Identifying new and/or expanded revenues
 - Developing a strategic sourcing process for the procurement of goods and services, including more effectively managing contracts
- All recommendations were thoroughly vetted to ensure they could be implemented within the set parameters. Each recommendation was subjected to a rigorous series of tollgates with DOA and agency leadership to ensure they fit within the state’s strategic plan as well as the defined scope.

Outcomes:

- The final report for the Government Efficiencies Management Support (GEMS) project contained 72 efficiency, cost savings, and new revenue opportunities exceeding \$2.7 billion for the State of Louisiana over five years.
- Following the completion of the final report on how to improve government operations, A&M led the Project Management Office implementing the recommendations and working closely with the DOA and other state agencies. The A&M team met weekly with all stakeholders and leadership in a trusted advisor role to maintain implementation timelines and problem solve any issues that arose.

Experience 3: Kansas Operational Efficiency Assessment

Client Organization

State of Kansas

Project Information

Location: Topeka, KS
 Value: \$2.6M
 Duration: October 2014 – April 2015
 Contact Information:
 Shawn Sullivan, Chief Operating Officer
 (785) 296-2436
 Shawn.Sullivan@ks.gov

Project Description

Due to losses in tax revenue, Kansas was projected to experience both current and future budgetary deficits. The State Legislature passed legislation to undertake an efficiency study covering budget analysis, budget process review, and efficiency and cost savings. A&M was contracted to conduct a comprehensive assessment to identify, quantify, and prioritize new approaches that would identify and enable opportunities to reduce costs and operate more efficiently.

Project Approach & Outcomes

Key Tasks:

- Evaluated the state’s ability to deliver citizens services, explored revenue and finance solutions to make up shortfalls, conducted a comprehensive operational review, and assessed organizations and leadership.
- Completed the government efficiency study working side-by-side with nine cabinet agencies and offices.
- Conducted a bottoms-up study of the state government and helped drive efficiency by improving cash collections, consolidating operations, maximizing federal funding, improving internal performance, identifying new and/or expanded revenues and developing a strategic sourcing process for the procurement of goods and services.

Experience 3: Kansas Operational Efficiency Assessment

- Assessed a variety of efficiency and cost savings initiatives, including service levels and delivery across a variety of functions, functional consolidation, shared services models, technology, workforce/human resources, facilities, and privatization opportunities.
- Thoroughly vetted all recommendations to ensure they could be implemented. Each recommendation was subjected to a rigorous series of tollgates with agency leadership to ensure they fit within the state’s strategic plan as well as the defined scope.

Outcomes:

- The final report for the State Efficiency Study contained 105 efficiency, cost savings, and new revenue opportunities exceeding \$2 billion for the State of Kansas over five years. Since the report’s issuance, the state:
 - Created a Program Management Office and codified certain recommendations to allow for the consolidation of shared services functions.
 - Created budgetary increases to allow for the hiring of auditors.

Experience 4: Rhode Island Efficiency Review

Client Organization

Office of Management and Budget

Project Information

Location: Providence, RI
 Value: \$937,159
 Duration: September 2017 – December 2017
 Contact Information:
 Jonathan Womer, Director of the Office of Management and Budget
 (401) 222-2280
 Jonathan.Womer@omb.ri.gov

Project Description

The State of Rhode Island was experiencing the largest decrease in unemployment in the nation, it was also facing below average liquidity measures and financial flexibility. As a result, Rhode Island was ranked 38th out of 50 states on financial condition with a FY2017 deficit of \$237 million. FY2018 revenue expectations decreased nearly \$40 million from initial projections and spending for Medicaid and other social services were projected to exceed expectations by \$15 million.

The scope of the Statewide Efficiency Review was focused on the following agency assessments:

- Agency of Health and Human Services
- Agency of Transportation
- Agency of Administration
- Agency of Education
- Agency of Revenue

Project Approach & Outcomes

Key Tasks:

- Analyzed opportunities for internal realignment and consolidation within the government agencies.
- Reviewed the current configuration of the Rhode Island state government and the duties and responsibilities of select key state agencies including identifying any potential areas of overlap and any programs that had accomplished their original objective or had otherwise become obsolete.
- Evaluated Health and Human Services Medicaid expenditures, administrative costs, revenue streams, and other sources of operational efficiency.

Outcomes:

- The final report for the State Efficiency Study identified potential savings opportunities totaling \$65.7 million (General Fund). Agency specific outcomes included:

Experience 4: Rhode Island Efficiency Review

- Agency of Health and Human Services-
 - A rebalancing of long-term care participant living settings across the Developmental Disabilities and Elderly Medicaid populations by introducing a new residential service offering and increased in-home supports as an alternative to nursing home care.
 - Introduction of copays for some patient populations within the Medicaid Managed care program that would apply to high-frequency Emergency Room utilization and pharmacy drug prescriptions.
- Agency of Administration-
 - Implement an overtime approval policy requiring managers to submit approvals for overtime usage with the goal of reducing overtime in the heaviest use agencies.
 - Span of Control/Organizational Redesign- Analysis of organization structure. Recommended an initiative to drive savings through identification of duplicative or unnecessary positions and/or improving manager to report ratios.
- Agency of Education-
 - Expand on the Community Eligibility Provision (CEP) for schools above the USDA threshold of 40% Free and Reduced Lunch (FRL) eligibility and pursue additional federal funding opportunities.
- Agency of Revenue-
 - Enhance the Discovery Unit through a mix of process modernization and expanded staffing to enable improved audit targeting with better use of data.
 - Streamline requirements and separate compliance from collections functions to help improve retention and collections productivity.
- Agency of Transportation-
 - Replace some outside design engineering contractors with in-house staff to reduce outsourcing expenditures and increase internal capabilities.
 - Increase use of Design-Build projects to lower costs and shorten project duration.

Experience 5: New Hampshire Efficiency Assessment

Client Organization	New Hampshire Department of Health and Human Services
Project Information	Location: Concord, NH Value: \$30M Duration: August 2020 – June 2023 Contact Information: Lori Weaver, DHHS Deputy Commissioner (603) 271-9545 lori.weaver@dhhs.nh.gov
Project Description	
The New Hampshire Department of Health and Human Services engaged A&M to conduct a rapid performance assessment of DHHS operations and programs to 1) understand the financial impact of the COVID-19 pandemic on program budgets; and 2) identify changes in program administration and service delivery that are essential to adapt to the challenges presented in the pandemic and in a post-pandemic environment. A&M’s environmental scan led the team to focus on the Department’s developmental disabilities waiver structures and service delivery system, providing supporting analysis and recommendations for a significant system redesign for which A&M has been subsequently engaged to help implement.	
Project Approach & Outcomes	
Key Tasks:	<ul style="list-style-type: none"> • A&M’s operational assessment was based four cornerstones of operations optimization:

Experience 5: New Hampshire Efficiency Assessment

- Systems Economy and Efficiency – Operations promote the best alignment between assessed need and service authorization.
- System Infrastructure – Adequate systems are in place to collect, measure, monitor and report service utilization for decision-making.
- Access to Services – Appropriate mechanisms are in place to provide participants with access to appropriate services with adequate funding.
- Community System Infrastructure – Sufficient community services are available to meet the needs of those deemed eligible to receive services.
- Using these guideposts to service delivery, the A&M team, in partnership with Division of Long-Term Supports and Services (DLTSS) and Bureau of Developmental Services (BDS) staff gathered and reviewed a significant number of documents, policies, data and budgetary information to conduct an analysis of BDS operations. In addition to its document review, A&M also conducted numerous interviews with members of the DLTSS and BDS Executive Leadership team to conduct targeted follow up and information gathering.

Outcomes:

- Recommended and provided a detailed strategy for the transformation of the service delivery system for the Developmental Disabilities Waiver within BDS including the development of tiered home and community-based 1915(c) waivers, changes to the State’s conflict-free case management structure, the implementation of an acuity-based fee schedule for the reimbursement of services, and IT modernization. The State has since engaged A&M to act as a strategic partner to the Department to support the implementation of these recommendations. In addition to architecting the strategy and program plan adopted by the Department, A&M plays various key roles in the day-to-day implementation of its recommendations:
 - Facilitating Stakeholder engagement across family, advocate, and provider groups to inform the development of service definitions to be incorporated into the redesigned waiver.
 - Project managing the redrafting of administrative rules for submission to New Hampshire Joint Legislative Action Committee and CMS to govern the redesigned waiver and key system changes such as conflict free case management.
 - Coordinating cross-departmental leads and vendor representatives to outline required system changes to support the future state of waiver services administration.

Experience 6: Oregon Child Welfare System Transformation

Client Organization

Office of the Oregon Governor

Project Information

Location: Salem, OR
 Value: \$2.5M
 Duration: April 2019 – December 2019
 Contact Information:
 Rosa Klein, Human Services Policy Advisor
 (503) 378-8472
 Rosa.Klein@oregon.gov

Project Description

The Oregon Secretary of State released audits finding significant deficiencies in the Child Welfare (CW) system within the Oregon Department of Human Services (ODHS). Concurrently, an Oregon-based advocacy group filed a class action lawsuit against the state and ODHS alleging that they had failed to provide necessary services through the foster care system. In response, the Governor issued an Executive Order to create a Child Welfare Oversight Board and hire a crisis management team to overhaul the CW system.

Project Approach & Outcomes

Key Tasks:

Experience 6: Oregon Child Welfare System Transformation

- A&M conducted a four-phase approach to addressing the challenges in Oregon Child Welfare, Phase 1: Initial Assessment and Planning; Phase 2: Workplan Implementation and Refinement; Phase 3: Ongoing Implementation; Phase 4: Ongoing Implementation and Transition.
- During A&M's time in the Oregon Child Welfare Agency, A&M focused on supporting ODHS and CW in the following key areas. As a result of the assessment, A&M provided recommendations in the following five areas to support:
 - Care Capacity
 - Improve Foster Care Certification Processes and Systems
 - Reduce Reliance on Out of State Placement
 - Facilitate Rapid Access of Mental Health and Substance Abuse Services for Youth
 - Data
 - Create Operational Key Metrics Dashboards
 - Overhaul Governors Monthly Report
 - Improve culture around use of data for ODHS/CW
 - Communications
- Streamline Public Records
 - Centralize CW Communications Team
 - Enhance Transparency through Communications
 - Improve Critical Incident Response and Prevention
- Workforce
 - Surge Hire Caseworkers and Field Staff
 - Create Opportunities to Improve Retention
 - Improve Child Welfare Training Systems
 - Improve Centralized Child Abuse Hotline Outcomes

Outcomes:

- A&M served as the crisis management team to assess the key deficiencies of the agency and implement operational improvements. Partnering with Child Welfare, ODHS, the Child Welfare Oversight Board, and the Governor, A&M:
 - Supported increasing the behavioral health providers to help reduce the youth placed out of state by 64% in less than nine months.
 - Revamped hiring processes to secure 7,000+ applications that led to conditional hires of 345 positions that was notably more diverse than the state's population at-large.
 - Revised the Critical Incident Review Team (CIRT) process to align with the reduced timeline and increased reporting requirements of new legislation and reorganized the team structure to increase independence of fatality reviews.
 - Helped establish the centralized public records team and reduced Public Record requests backlog of 500+ requests to functional zero in five weeks.
 - Partnered with the ODHS Communications team to revamp the Governor's Child Welfare Monthly Report and developed dashboard to track performance metrics for key initiatives.
 - Leveraged data and performance management to drive more productive behaviors and decision making for Hotline staff to improve quality, efficiency, and responsiveness.

5.3. Staffing

A&M is pleased to propose a high-performing, mission-driven team purpose-built to deliver efficiency and effectiveness for West Virginians. Our team combines the analytical rigor of a leading public sector consulting practice with deep, hands-on experience identifying and enabling execution of performance improvement initiatives, designed to decrease costs and increase service delivery for constituents.

We employ an integrated delivery model, underpinned by a flexible and agile organizational structure, and backed by a national bench of experts to deliver the right expertise for each engagement.

We take a deliberate, client-centered approach to staffing that balances technical specialization, domain expertise, and delivery excellence. Our proposed team reflects a diverse blend of effectiveness and efficiency experts, domain expertise, and personnel who are adept at rapidly identifying opportunities for performance improvements.

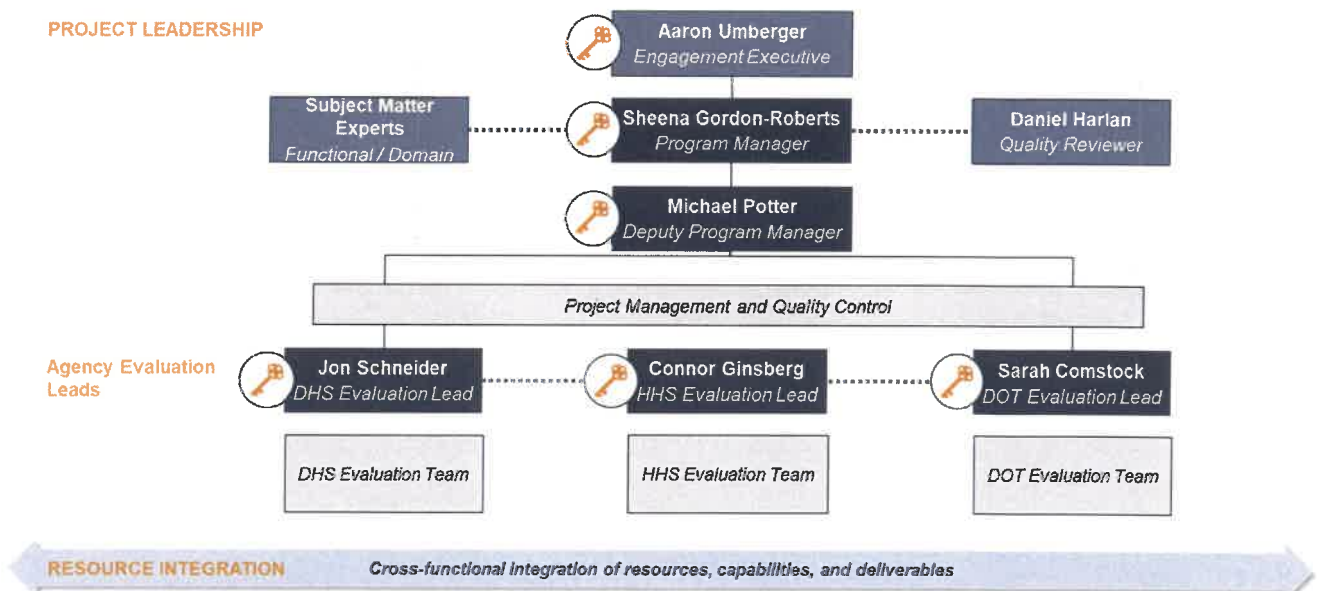
Each individual included in this proposal was selected based on their deep subject matter expertise, strong technical capabilities, and successful track record in government performance improvement. Their qualifications, which are detailed in the section below, collectively span the full spectrum of the RFP requirements and reflect a blend of public- and private-sector experience, academic credentials, and policy acumen.

Key highlights of our team’s qualifications include:

- **Expertise in State Level Efficiency and Effectiveness:** Members of our team have led statewide performance reviews in similarly sized and situated states, including Kansas, Louisiana, Oklahoma, Alaska, and others. We will use that experience to enable us to rapidly develop comprehensive and actionable insights for the Governor’s Office.
- **Domain Expertise and Experience:** Our team includes leaders and staff who have worked with DoHS, DHS, and DOT organizations across the country, at both the state and Federal level. This feature enables us to identify common opportunities for improvements and rapidly deliver results.
- **Functional Expertise and Experience:** Our professionals have expertise and experience in the functional areas within DoHS, DHS, and DOT that are impactful to the scope of this review. Our expertise in these areas enables us to explore the levers to improve efficiency and effective service delivery.

For each proposed individual, we identify how they qualified to support and how their professional background aligns with West Virginia’s project goals. The team includes both committed staff and surge resources from our national bench to ensure West Virginia has access to the right expertise when needed. **Figure 6** depicts our organizational chart to deliver this key effort for the State.

Figure 6: A&M’s organizational chart shows our proposed project team that will successfully complete this effort.



5.3.1. Personnel Biographies

Aaron Umberger
Project Role: Engagement Executive
Degree/Certifications <ul style="list-style-type: none"> • Bachelor of Business Administration, James Madison University • Certified Professional Contracts Manager (CPCM) • Project Management Professional (PMP)
Summary of Qualifications <p>Mr. Umberger has over 16 years' experience delivering efficiency and effectiveness outcomes for government clients. He specializes in strategic engagements focused on reducing costs and improving operations. He possesses extensive knowledge of operational improvement, having supported Defense strategic transformation initiatives, General Services Administration (GSA) category management initiatives, and the cost effective procurement of supplies and services for Department of Defense (DoD), Department of Homeland Security (DHS), and various other organizations.</p>
Relevant Experience <ul style="list-style-type: none"> • Department of Homeland Security: Led numerous teams across multiple DHS components to improve operations and processes. Analyzed program requirements and results and determined alignment to agency mission to achieve affordability and deliver capabilities to law enforcement organizations. Assessed technology elements and programs to right size technology portfolios for business and mission systems. • Department of Transportation: Evaluated acquisition processes, workforce, and policy based on Federal acquisition regulations and Government Accountability Office guidance. Provided recommendations for actions to maintain acquisition existing best practices and recommended areas of improvement. Briefed DOT acquisition leadership on assessment findings and recommendations and suggested approaches on action items to achieve recommended improvements and maintain best practices. • Department of Defense: Oversaw several organizational and program assessments for Department of Defense (DoD) components, aimed at increasing operational efficiency and/or warfighting capabilities. These assessments included workforce, technology, governance, policy, and procurement and focused on benchmarking against similar organizations and industry best practices. • General Services Administration: Led the development and implementation of strategic sourcing/category management initiatives through industry-recognized best practices. Supported organizational redesign within a category management/strategic sourcing framework. Provided guidance to the team in developing acquisition organization structure and staffing plans, based on estimated procurement workloads.

Daniel Harlan
Project Role: Engagement Quality Reviewer/HHS Subject Matter Expert
Degree/Certifications <ul style="list-style-type: none"> • Bachelor of Systems Engineering, University of Virginia • Project Management Professional (PMP) • Prosci® Change Management Certification
Summary of Qualifications <p>Mr. Harlan has nearly 20 years of state and federal experience, supporting public sector leaders drive transformational change, manage federal resources and achieve operational sustainability. He brings a hands-on approach to improving financial and operational management of public sector programs with a focus on health and human services. He specializes in data-driven financial and operational assessments, business process re-engineering, and strategy development in complex operational, financial and IT environments.</p>
Relevant Experience <ul style="list-style-type: none"> • Georgia Office of Planning and Budget: Led a team that supported Georgia's unwinding of continuous Medicaid eligibility, assessing compliance with federal requirements, identifying enhancements to improve efficiency, responding to evolving federal guidance, and supporting on-going data analysis for both internal and external reporting. • Georgia Department of Behavioral Health and Developmental Disabilities: Led a team that conducted a study of the State's crisis bed capacity; built a bed capacity projection model, developed a strategic plan to assist the State in making future crisis bed investments.

Daniel Harlan

- **Rhode Island Department of Children, Youth and Families:** Led a team that provided finance, child-welfare, and Medicaid subject matter expertise to recommend improvements in the provision of services and use of federal funds to support improved service delivery.
- **Maryland Developmental Disabilities Administration:** Led a team that worked with the \$1B Medicaid program to stabilize operations, complete a business process reengineering, and execute the transformation of its operations. Reduced processing backlogs, increase confidence in operational and financial processes, and reduce General Fund expenditures by more than \$15M.
- **Government of Puerto Rico:** Led a team that focused on an operational analysis of the Education department's food service operation with a focus on efficiencies and cost savings in alignment with Federal requirements. Identified opportunities for increased federal funding and reduced waste in the program.
- **Homeland Security Presidential Directive (HSPD-12) Program Offices at National Institutes of Health (NIH), Federal Emergency Management Agency (FEMA), Immigration and Customs Enforcement (ICE):** Coordinated IT, business processes re-engineering, and communications efforts to successfully roll out secure HSPD-12 credentials and comply with Federal directives.

Sheena Gordon-Roberts

Project Role: Program Manager

Degree/Certifications

- Master of Business Administration, Finance, Columbia University
- Bachelor of Arts, Economics: Barnard College

Summary of Qualifications

Ms. Gordon-Roberts has over 20 years' experience, leveraging insightful analysis to positively impact private and public sector clients' financial and strategic goals. She specializes in government efficiency and financial management transformation. Sheena has conducted several state and local efficiency reviews focusing on cost reduction, revenue enhancement, and improved taxpayer outcomes. Her financial management transformation engagements have covered a range of approaches including process and policy improvements, enhancing internal controls, debt service accounting, organizational structure, employee training, and performance management.

Relevant Experience

- **State of Wyoming:** Ms. Gordon-Roberts led the Project Management Office (PMO) for a statewide efficiency project, coordinating 20 individuals across six workstreams, while also leading a organizational line of service review aimed at identifying new approaches to reduce costs and eliminate overlapping or obsolete programs across state agencies, which identified \$90 million cost savings and revenue enhancements for thirteen agencies. She also testified on findings and recommendations to the state legislature.
- **State of Oregon:** Ms. Gordon-Roberts led the PMO across five workstreams for a crisis management engagement related to the Governor's Executive Order to improve outcomes in Child Welfare with the Department of Human Services. She led the A&M team in partnering with staff to implement recommendations to improve processes and organizational structure and presented regularly on A&M's progress to the Governor and other oversight bodies. While leading the PMO for the engagement, Ms. Gordon-Roberts also led organizational redesign efforts for the Communications Team and the Child Fatality Review and Prevention Team, enhancing public communication and streamlining organizational structures.
- **State of Rhode Island:** Ms. Gordon-Roberts supported A&M's Rhode Island Statewide Efficiency Review engagement, helping to identify efficiency opportunities across the Departments of Administration, Human Services, and Transportation. During the COVID-19 pandemic, Ms. Gordon-Roberts led the design and execution of the High-Density Communities COVID-19 vaccination strategy in coordination with local municipal leaders, community organizations and health care providers, to establish vaccination clinics in some of the state's most vulnerable communities.
- **State of Oklahoma:** Ms. Gordon-Roberts evaluated the state's evolving constituent needs and assessed improvements in the tax collections process and motor vehicle services for the Oklahoma Tax Commission. When A&M was re-engaged by the new agency, Service Oklahoma, Ms. Gordon-Roberts led a team in conducting a standard operation procedure gap assessment and developing SOP documentation to help clearly define key process to help streamline operations and improve customer experience.

Michael Potter
Project Role: Deputy Program Manager
Degree/Certifications <ul style="list-style-type: none"> • Master of Public Administration, Finance, Indiana University • Bachelor of Science, Political Science, Oakland University • Project Management Professional • Six Sigma Greenbelt
Summary of Qualifications <p>Mr. Potter has over 15 years' experience in public sector financial management. He specializes in leveraging data-driven insights to enhance efficiency, accountability, and operational effectiveness for clients. Mr. Potter has led transformative improvement initiatives across state and local government agencies, including several transportation organizations, with expertise spanning finance, operations, human resources, and IT systems, making him a valuable asset in driving impactful solutions.</p>
Relevant Experience <ul style="list-style-type: none"> • Massachusetts Bay Transit Authority – Operations: Led A&M's support of the Chief Transformation Officer's assessment and transformation of MBTA's cash logistics operations, including an initial security, internal controls, and efficiency assessment, which identified significant risks. Assumed interim management of the cash logistics facility, adjusted scheduling, staffing, policies, and procedures to address accountability and efficiency issues, and conducted a reconciliation of cash receipts. Identified the opportunity to improve operations and reduce risk through third party partnerships for cash logistics and executed outsourcing strategies to generate \$5M in annual savings while eliminating financial imbalance and reducing risk. • Puerto Rico Highways and Transportation Authority (PRHTA): Served as financial advisor to PRHTA through Hurricane Maria recovery and the Puerto Rico debt crisis. Identified, vetted, and led implementation of a series of cost reduction and efficiency efforts, including reductions in force, contract renegotiations, and enhancing third-party partnerships to drive increased revenue. Led the development of two annual operating and capital budgets and developed long-term financial model to support restructuring. Advised on the procurement and management of Automated Fair Collection System (AFCS) modernization to support cost-efficiency and Federal funding source compliance. • United State Postal Service (USPS): Conducted a comprehensive efficiency study of USPS, evaluating all facets of the processing and distribution network and identifying 11 efficiency initiatives each contributing more than \$100M in annual savings. Developed a processing and distribution workforce model and position control system to support leaders in identifying and controlling for overstaffing and overtime costs. • Houston Independent School District: Conducted an initial independent financial assessment, and identified opportunities for improvements to district budgeting, back office finance process, and long-term financial planning capabilities. Led a multi-year improvement initiative to reform financial processes, increase accountability, improve transparency to the board and public. Led the district's first zero based budget process, identifying over \$100M in savings opportunities, and reconciled the districts American Rescue Plan Act (ARPA) plans with changes in strategic direction to support lasting sustainability.

Jon Schneider
Project Role: DHS Evaluation Lead
Degree/Certifications <ul style="list-style-type: none"> • Master of Business Administration, Georgetown University's McDonough School of Business • Bachelor of Economics and Government Politics, University of Maryland • Lean Six Sigma Green Belt • Coupa Platform Certification
Summary of Qualifications <p>Mr. Schneider has over 12 years' experience performing studies, analysis, and execution in operational efficiency efforts across state and federal government organizations. Mr. Schneider specializes in performance management, internal controls, process improvement, and organizational assessment across homeland security and defense organizations. He has experience leading projects at the U.S. Department of Homeland Security, including the U.S. Customs and Border Protection and U.S. Transportation Security Administration, and the Department of Defense.</p>
Relevant Experience

Jon Schneider

- **Department of Homeland Security (DHS), Customs and Border Protection:** Developed a business case document for the Preclearance Field Office (PCFO) to market the program to potential new Preclearance locations across the world. Conducted economic research to quantify the benefits of the Preclearance program to foreign governments and the US taxpayer.
- **Department of Homeland Security (DHS), Transportation Security Administration (TSA):** Served as the project manager leading a team of nine in support of multiple TSA priorities. Conducted an office-wide assessment of an organization’s mission, goals, and challenges via working session with office leadership. Findings were used to develop a five-year plan to mature the organization and improve day-to-day operations. Completed several ad-hoc studies to assess new technologies, including conducting an analysis of biometric pilot program at airports to improve the efficiency and customer experience for TSA Pre-Check members.
- **U.S. Navy:** Led process improvement/performance management initiatives to expand supply chain facilitation support services across the Atlantic Fleet to accelerate vital repairs to always maintain adequate levels of mission capability. Led a team to document current state processes and identified future state vision, supporting the on-going reorganization of maintenance operations center to include change management and business process re-engineering.
- **U.S. Consumer Product Safety Commission (CPSC):** Developed a scalable concept of operations/implementation plan that provides a 5-year roadmap to align operations to meet the new requirements of the e-Commerce industry. Facilitated several strategic planning sessions to outline the organization’s vision, operational needs, goals, and objectives.

Connor Ginsberg

Project Role: DoHS Evaluation Lead

Degree/Certifications

- Master of Business Administration, Georgetown University’s McDonough School of Business
- Bachelor of Arts in History, Tufts University

Summary of Qualifications

Mr. Ginsberg has over 7 years’ experience leading and delivering efficiency efforts and strategic planning for healthcare organizations. He has led teams in performing data analysis, financial analysis, strategic planning, and project management for statewide efficiency efforts.

Relevant Experience

- **Wyoming Governmental Spending and Efficiency Commission:** Managed all aspects of A&M’s work with the state of Wyoming to ensure that a 20+ person team completed all contractual obligations on-time and under budget. Led strategic sourcing workstream aimed at simplifying state’s supply chain as part of multi-agency review to identify opportunities to both reduce expenses and drive incremental revenue.
- **Rhode Island Efficiency Review:** Conducted a detailed analysis to inform recommendation to the State of Rhode Island to conduct a statewide organizational redesign to save \$38M annually. Work was part of statewide efficiency review that identified, quantified, and prioritized initiatives to enhance revenue, efficiencies, and reduce costs.
- **Yale New Haven Health Strategic Cost Reduction:** Managed phase I of system-wide effort to reduce expense base by upwards of \$100M. Efforts included driving organizational redesign effort, span of control analysis, and operational optimization initiatives. Identified achievable savings of \$46M with implementation of \$26M. Identified opportunities to change insourcing/outsourcing mix throughout corporate service functions.

Sarah Comstock

Project Role: DOT Evaluation Lead

Degree/Certifications

- Master of Public Administration (MPA) (Honors), Public-Private Partnerships, The George Washington University
- Bachelor of Arts in English (Hons), The George Washington University
- Public Management Professional (PMP)
- Certified SCRUM Master

Summary of Qualifications

Sarah Comstock

Ms. Comstock has 15 years of experience in public sector consulting and specializes in organizational evaluation and transformation, designing and implementing targeted solutions to improve operational effectiveness and efficiency, and proactively managing change across stakeholder groups. Ms. Comstock led three large scale organizational assessments and organizational design efforts across the U.S. Department of Transportation (DOT). For these engagements, she led multiple teams to conduct current state assessments, identify efficiency and effectiveness gaps, and design organizational change recommendations. She also brings extensive experience conducting resource modeling efforts at multiple federal agencies seeking to better understand their staff resources and anticipate demand.

Relevant Experience

- **Department of Transportation (DOT), Build America Bureau:** Led a team to conduct an environmental scan of the Bureau’s operational opportunities and challenges and identify strategic enhancements to its operating model. Designed and facilitated comprehensive interviews with a diverse set of staff and stakeholders. Ms. Comstock also led the design and analysis of a Bureau-wide survey to quantify perspectives to substantiate and illustrate findings. The environmental scan resulted in a comprehensive report of opportunities and challenges that was presented to Bureau leadership.
- **Department of Transportation (DOT), Office of the Secretary, Office of Grants Management and Financial Assistance:** Led a team to design and establish a new office for grants management and financial assistance support across DOT. The goal of the office was to increase technical assistance, training, and internal assessment support across the agency. She conducted listening sessions with modal stakeholders, conducted benchmarking, and developed the design and functional requirements for the new office. She facilitated multiple functional design sessions using the online collaboration platform, Mural. During sessions, participants worked together to produce real-time functional structures based on design requirements. Oversaw efforts to produce multiple staffing scenarios weighing the pros and cons for leadership decision making including the ability for employees to grow in the roles.
- **U.S. Department of Transportation (DOT), Federal Transit Administration (FTA):** Oversaw a team conducting an organizational assessment and developing workload modeling across FTA. She guided the team on project methodology, led all client interactions, and provided quality assurance. She designed the current state assessment, led 30+ workshops and focus groups, led the identification of organizational change recommendations, and presented findings and recommendations to the FTA Administrator, Deputy Administrator, and Executive Director on multiple occasions. She then led the team to implement recommendations including the design and approval of the new Office of the Chief Data Officer.
- **Department of Homeland Security, Immigration and Customs Enforcement (ICE), Office of Budget and Program Performance (OBPP):** Led a team of 12 to develop, refine, and deliver workload modeling reporting and dashboarding across the entire ICE enterprise. She managed all work products for quality and consistency and owned day-to-day client relationships.

5.4. Existing or Potential Conflicts of Interest (4.5.2.2)

A&M Public Sector Services certifies that it does not have any existing or potential conflicts of interest arising from A&M performing this effort for the Office of the Governor of West Virginia. A&M does not have any existing work with the State of West Virginia nor any work with other Federal, state, or local governments that give risk to any existing or potential conflicts of interest. A&M prides itself on independence and objectivity, enabling us to deliver high quality results for our clients without conflict.

5.5. Data Protection Standards and Confidentiality Agreements (4.5.2.3)

A&M is committed to ensuring the confidentiality, integrity, and availability of all sensitive data in accordance with applicable federal and state regulations, including but not limited to the Health Insurance Portability and Accountability Act (HIPAA), Family Educational Rights and Privacy Act (FERPA), Federal Information Security Management Act (FISMA), and other relevant privacy and security requirements.

A&M maintains robust cybersecurity policies and procedures and invests significant resources to protect client data. We serve a diversified set of clients around the world, including the largest corporations, Governments, and nonprofits. As part of these engagements, our team is entrusted to secure some of our clients’ most sensitive data. We maintain established data protection and cybersecurity policies which are reviewed and updated annually to reflect current laws, regulations, and best practices in information

protection and cybersecurity. Additionally, our team maintains an ISO 27001: 2013 certification, demonstrating an independent accreditation of industry best practice cybersecurity and client data protection policies.

A&M maintains robust data governance policies and technical safeguards to ensure compliance with:

- **HIPAA:** For systems managing Protected Health Information (PHI), we implement administrative, physical, and technical safeguards in accordance with the HIPAA Security and Privacy Rules. All staff with access to PHI receive HIPAA-specific training and sign confidentiality agreements.
- **FERPA:** For handling student education records, we ensure data access is limited to authorized individuals, and data is used solely for educational purposes as defined by the educational institution and FERPA regulations.
- **FISMA:** For applicable federal data, we follow FISMA guidelines including risk assessment, continuous monitoring, incident response, and adherence to NIST SP 800-series publications (e.g., 800-53, 800-171) to ensure adequate information security controls.
- **Other Regulations:** We remain vigilant to other applicable laws and applicable state data privacy laws, adjusting our data practices as needed to maintain full compliance.

Our data handling procedures include, but are not limited to, the following:

- **Data Classification & Access Control:** All data is classified based on sensitivity and handled accordingly. Role-based access controls (RBAC) ensure that only authorized users can access specific data types. Multifactor authentication is enforced where applicable.
- **Encryption:** Data is encrypted both in transit (TLS 1.2 or higher) and at rest (AES-256). Encryption keys are securely managed and rotated according to policy.
- **Audit Logging & Monitoring:** We maintain audit trails for all access to sensitive data and regularly monitor logs for anomalous activity. Logs are retained according to regulatory and contractual requirements.
- **Incident Response:** We maintain an incident response plan that outlines procedures for identifying, containing, investigating, and reporting security incidents. We provide timely notification of any breach affecting covered data in compliance with legal requirements.
- **Training & Awareness:** All personnel undergo annual security and privacy training, including specific modules on HIPAA, FERPA, and general data handling best practices. Training is documented and reinforced through internal audits.
- **Data Retention & Disposal:** Data is retained only as long as necessary for contractual or legal purposes. Secure data disposal methods, including secure erasure and physical destruction of media, are employed for all data at end-of-life.
- **Subcontractor Compliance:** Any third-party vendors or subcontractors with access to sensitive data are required to sign binding agreements ensuring they meet the same data protection standards. Business Associate Agreements (BAAs) are executed where required under HIPAA.

5.6. Nondisclosure Agreement (4.5.2.4)

This **Non-Disclosure Agreement** (this "Agreement"), entered into and made effective as of this the 23rd day of July, 2025, is by and between (1) Alvarez and Marsal Public Sector Services, LLC, located at 655 15th St. NW, Suite 600, Washington, DC 20005 (the "Company"), and (2) the Office of the Governor of

the State of West Virginia located at 1900 Kanawha Blvd. E., Charleston, West Virginia, 25305 (the "Governor's Office"). The Company and the Governor's Office each may be referred to hereinafter individually as a "Party" and collectively as the "Parties."

WHEREAS, the Company and the Governor's Office intend to enter into certain discussions concerning CRFP 0100 GOV260000001, Office of the Governor – Performance Evaluation Audit (the "Project"), and in the course of such discussions it may be necessary for the Governor's Office and/or the Company to disclose certain confidential information to the other Party (the "Confidential Information"); and

WHEREAS, the Company and the Governor's Office desire to enter into this Agreement to allow for the exchange of Confidential Information, as hereinafter defined, to facilitate the development of the Project, as more fully set forth in this Agreement.

NOW THEREFORE, in consideration of the promises and covenants made herein, and other good and valuable consideration, the sufficiency of which is hereby acknowledged, the Parties agree as follows:

1. Confidential Information. "Confidential Information" shall mean all information, regardless of the form in which it is communicated or maintained (whether oral, written, digital or visual) and whether prepared by the Governor's Office, and its Affiliates, and/or the Company which relates to the Project, and the business and planned activities of the Parties, and their affiliates, including all reports, analyses, notes, copies, data, models, or other information based on, contain or reflect any such Confidential Information or which have been marked by the Parties as "confidential." Confidential Information shall not include the following:

- a. Information which is or becomes publicly available other than as a result of a violation of this Agreement;
- b. Information which is or becomes available on a non-confidential basis from a source which is not known to a Party to be prohibited from disclosing such information pursuant to a legal, contractual or fiduciary obligation;
- c. Information which a Party can demonstrate was legally in its possession prior to disclosure by the other Party;
- d. Information which a Party independently developed without the use of Confidential Information of the other Party; or
- e. Information which is required by state or federal law, or by a court of competent jurisdiction, to be disclosed.

2. Nondisclosure and Use of Confidential Information. The Company acknowledges and agrees that the Governor's Office is subject to the West Virginia Freedom of Information Act, W. Va. Code § 29B-1-1 et seq. (the "FOIA"), and that the Governor's Office's obligations hereunder are subject in all respect to applicable West Virginia law that requires "public bodies" to disclose "public records," as those terms are defined in the FOIA. FOIA, however, does recognize exemptions, including for trade secrets, which is defined to include "any formula, plan, pattern, process, tool, mechanism, compound, procedure, production data, or compilation of information which is not patented which is known only to certain individuals within a commercial concern who are using it to fabricate, produce, or compound an article or trade or a service or to locate minerals or other substances, having commercial value, and which gives its users an opportunity to obtain business advantage over competitors." W. Va. Code § 29B-1-4(a)(1). FOIA further exempts "[i]nternal memoranda or letters received or prepared by any public body," which includes "evidentiary privileges as the attorney-client privilege, the attorney work-product privilege, and the executive 'deliberative process privilege,'" and extends to "[d]raft documents." W. Va. Code § 29B-1-

4(a)(8); *Daily Gazette Co. v. W. Va. Dev. Office*, 198 W. Va. 563, 571, 482 S.E.2d 180, 188 (1996); and *Highland Mining Co. v. W. Va. Univ. School o/Medicine*, 235 W. Va. 370, 386, 774 S.E.2d 36, 52 (2015). The internal memoranda exemption applies to "written advice, opinions and recommendations to a public body from outside consultants or experts obtained during the public body's deliberative, decision-making process." Syl. pt. 4, *Daily Gazette Co.*, 198 W. Va. 563, 482 S.E.2d 180. Subject to the foregoing, Confidential Information of the Company shall be held in strict confidence by the Governor's Office, and shall not be disclosed without prior written consent of the Company, except to those employees and agents of the Governor's Office with a "need to know" the Confidential Information for purposes of discussing the Project with the Company. The Governor's Office shall not use the Confidential Information for any purpose other than in connection with discussing the Project with the Company.

3. Required Disclosure. In the event that a Party is requested or required by legal or other authority to disclose any Confidential Information, such Party shall promptly notify the other Party of such request or requirement prior to disclosure so that the Party opposed to disclosure may seek an appropriate protective order and/or waive compliance with the terms of this Agreement. In the event that a protective order or other remedy is not obtained by the time that such is required to disclose the Confidential Information, or the other Party waives compliance with the provisions hereof, the disclosing Party agrees to furnish only that portion of the Confidential Information that it reasonably determines, in consultation with its counsel, is consistent with the scope of the subpoena or demand, and to exercise reasonable efforts to obtain assurance that confidential treatment will be accorded such Confidential Information.

4. Remedies. Each Party agrees that given the subject matter, injunctive or other equitable relief will likely serve as the appropriate relief to remedy or prevent any breach or threatened breach of this Agreement.

5. No License. It is understood and agreed that nothing contained in this Agreement shall be construed as granting or conferring rights by license or otherwise in any Confidential Information disclosed during the term of this Agreement. Each Party acknowledges and agrees that each Party has and reserves the right, in its sole discretion and at any time and without notice, to terminate discussions or negotiations.

6. Amendment. Any amendment to this Agreement must be in writing and signed by an authorized representative of each Party.

7. No Other Agreement. It is understood that this Agreement is not intended to and does not obligate the Parties, or either of them, to enter into any further agreements or to proceed with any other transaction or relationship.

8. Non-Waiver. No waiver of any provision of the Agreement shall be deemed to be nor shall constitute a waiver of any other provision whether or not similar, nor shall any waiver constitute a continuing waiver. No waiver shall be binding unless executed in writing by the Party making the waiver.

9. Governing Law. This Agreement shall be governed by and construed in accordance with the laws of the State of West Virginia without regard to rules concerning conflicts of laws.

10. Affiliate. "Affiliate" means any other person (natural person, corporation, limited liability company, partnership, firm, association, or any other entity) that directly, or indirectly through one or more intermediaries, controls, is controlled by or is under common control with, the party specified. Control occurs wherever a legal or natural person directly or indirectly through one or more intermediate legal persons owns or controls in aggregate fifty percent or more of voting capital.

11. Media. So long as the Governor's Office does not disclose Confidential Information, the Governor's Office is free to make public comments on the Project. The Company, however, is strictly prohibited from making any public comments on the Project-regardless of whether those public comments directly relate to Confidential Information-without first obtaining written approval from the Governor's Office. "Public comments" include press conferences, press releases, social media posts, or any other means of disseminating information to the public.

12. Term & Termination. The Governor's Office may terminate this Agreement upon 30 days' written notice. The Company may terminate this Agreement upon written consent of the Governor's Office. This Agreement shall remain in full force and effect until it is terminated.

13. Notices. Any notices or requests that may be given or made pursuant to this Agreement must be in writing and delivered personally, by registered or certified mail, postage prepaid, by a recognized overnight delivery service or by facsimile, which shall be deemed received upon confirmation of receipt in legible form to the Parties at the following:

If to the Governor's Office:

WEST VIRGINIA GOVERNOR'S OFFICE

1900 Kanawha Blvd.,

East Charleston, WV 25305

Attn: Jamion Wolford, CFO

If to the Company:

Alvarez and Marsal Public Sector Services, LLC

655 15th St. NW, Suite 600

Washington, DC 20005

Attn: Aaron Umberger

14. Entire Agreement. This Agreement constitutes the full and entire agreement between the Parties regarding the confidentiality and use of the Confidential Information.

15. Counterparts. This Agreement may be signed in counterparts, each of which may be deemed an original, and all of which together constitute one and the same agreement.

IN WITNESS WHEREOF, the Parties hereto have executed this Agreement on the date first set forth above.

WEST VIRGINIA OFFICE OF THE
GOVERNOR OF WEST VIRGINIA

By: _____

Its: _____

Alvarez and Marsal Public Sector Services, LLC



By: Aaron Umberger

Its: Managing Director

5.7. Litigation, Investigations, Fines, or Enforcement Actions Disclosure (4.5.2.5)

A&M Public Sector Services certifies that it does not have and has not had any litigations, investigations, or enforcement actions related to fraud, unethical conduct, or failed performance within the past seven years.

Appendix A: Designated Contact

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) Aaron Umberger, Managing Director

(Address) 655 15th Street NW, Suite 600 Washington, DC 20001

(Phone Number) / (Fax Number) (571) 926-4679 / (202) 729-2101

(email address) aumberger@alvarezandmarsal.com

Appendix B: RFP Certification

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.



(Signature)

Alvarez and Marsal Public Sector Services, LLC
(Company)

Aaron Umberger, Managing Director
(Representative Name, Title)

(571) 926-4679/(202) 729-2101
(Contact Phone/Fax Number)

July 23, 2025
(Date)

Appendix C: Addendum Acknowledgement Form

Solicitation No.: CRFP GOV26*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.

Alvarez and Marsal Public Sector Services LLC
Company



Authorized Signature

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

Revised 6/8/2012