

Project and Vendor Management Advisors, LLC

("PVMA")

for

Disaster Recovery, Financial Reimbursement and Compliance Management Capabilities Statement



*Results from your **Trusted Advisors** (sm)*

Contact:

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www.pvmallc.com

Certified Women-Owned Small Business (WOSB) and SBA Certified Historically Underutilized Business (HUBZone)

Certificate Number 50364

NAICS Codes: 541611, 541612, 541613, 541820, 561320, 561410, 561499, 611710, 813110, 813940, 921190

State of Texas Certified Historically Underutilized Business (HUB)

Certificate/VID Number: 1272505651400, File Vendor Number: 4757623

Class Item Codes: 958 Management Services, 16, 26, 39, 56, 58, 68, 70, 74, 88 and 918 Consulting Services 38, 49, 58, 75, 79, 81, 88, 96

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Principal Office: • 3003 N Heights Hollow Ln., Houston, TX 77007

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Introductory Letter

To our clients, partners and future clients:

Project and Vendor Management Advisors, LLC (“PVMA”) was founded with a mission to assist our public sector and private sector clients implement and manage complex, regulatory-based projects that require innovative ideas to compete effectively in the global economy.

Please accept this document as our proven capabilities to provide assistance to municipalities and public sector agencies concerning Disaster Recovery, Financial Reimbursement and Compliance Management based on the Federal Stafford Act, the Public Assistance and Individual Assistance Programs, and Community Development Block Grant (“CDBG”) Disaster Recovery funding.

Our seasoned professionals have the experienced to provide several areas of project management from operating several recovery projects following Hurricanes Katrina, Gustav, and Ike. We possess the knowledge, skills and capabilities to deliver value added, resource efficient and cost effective projects that will allow staff to continue performing day-to-day work activities absent the concern that a project will be delivered as expected -- *with quality, within budget and on-time.*

Our team has provided the following Disaster Recovery, Reimbursement Management and Compliance services since 2005, and this capabilities statement will outline several of our key projects. Our professional services in most cases reimbursed through FEMA pursuant to the request of the public agency and/or municipality.

I hope you continue to explore the PVMA teams’ capabilities and will find our knowledge and skills meet your requirements and needs.

Project and Vendor Management Advisors, LLC

Sincerely,



Laurie A. Robinson, Managing Principal



CORPORATE INFORMATION
PROJECT AND VENDOR MANAGEMENT ADVISORS, LLC
"PVMA"

- (1) DUNS Number: 033357580
- (2) Company Name: Project and Vendor Management Advisors, LLC
- (3) Company Address: Principal Office: 3003 N. Heights Hollow Ln.
Houston, Texas 77007
Mailing Office: 4801 Woodway, Suite 300 East
Houston, TX 77056
- (4) Company Point of Contact: Laurie A. Robinson, Managing Principal
Office Phone Number: (832) 439-2351
Email Address: laurierobinson@pvmallc.com
- (5) NAICS: 541611 (Admin Management and General Management)
561320 (Temporary Help Services)
561410 (Document Preparation Services)
541612 (Human Resources Consulting Services)
541613 (Marketing Consulting Services)
541820 (Public Relations Agencies)
561499 (All other Business Support Services)
611710 (Educational Support Services)
813110 (Religious Organizations)
813940 (Political Organizations)
- (6) Corporate structure: Limited Liability Corporation (LLC)
- (7) Registered in CCR (SAM): Yes
- (8) Current GSA Schedules: No
- (9) Approved accounting system: No
- (10) Set-Aside Status: Women-Owned Small Business, Small Business
Texas Certified Historically Underutilized Business (HUB)
SBA Certified Historically Underutilized Business
(HUBZone)
- (11) Company Founding Date: March 26, 2010

I. COMPANY

Project and Vendor Management Advisors, LLC (“PVMA”) www.pvmallc.com is management consulting firm that provides an effective and proven project management framework to deliver professional services to our public sector and private sector clients. PVMA employs seasoned consultants and advisors who believe that good project management delivery is an integral part and essential to any successful project implementation.

The PVMA staff includes project managers, certified public accountants, certified fraud examiners, accountants, lawyers and financial managers - all considered experts in their industries. With an average of 20 years of project management experience, the PVMA team has developed comprehensive knowledge, skills and capabilities to successfully deliver a single focused job to more complex large-scale inter-disciplinary highly regulated projects for our clients.

From the outset of any project, the PVMA team employs a multifaceted project management framework to deliver projects that are aligned with an organization’s new or evolving business strategy. PVMA has proven templates, tools, and techniques that facilitate better project implementation results and value, and we provide staff that possesses the right skills and expertise to create value for our clients. Our goal is to deliver results and be your organization’s trusted advisor.

PVMA is a women-owned small business (“WOSB”) as designated by the U.S. Small Business Administration, a State of Texas certified Historically Underutilized Business (“HUB”) and a SBA certified Historically Underutilized Business (“HUBZone”) located in Houston, Texas.

II. CORE CAPABILITIES

Through years of experience, PVMA, LLC has proven core capabilities in several areas of management consulting services. Our team has been trusted to manage over \$1.5 billion in federal funds to implement projects and manage regulatory based programs since 2005. Our core services are comprehensive and many organizations out-source the day-to-day operations to members of the PVMA team, which proves to be cost effective and more efficient for our clients. Our services include:

- Project and Program Management
- Vendor Management
- Internal and Fraud Auditing
- Government Affairs
- Staff Augmentation

III. INDUSTRY EXPERTISE

Our comprehensive management consulting services cross several industries and out and members of our management staff are “Subject-Matter-Experts” in their industry fields from years of hands-on experience. Our team has delivered successful projects as project managers and management consultants in each of these industry areas. We provide innovate ideas and best-practices to our clients by continuously seeking new skills, techniques, and education in several industry areas.

Industries include:

- Healthcare
- Social Services
- Housing
- Disaster Recovery
- Transportation

IV. PAST PERFORMANCE EXPERIENCE

Members of the PMVA team have led, directed and managed projects during every disaster that affected the Gulf Coast since 2005. Our team has provided emergency management and disaster recovery assistance to municipalities, agencies, and the largest academic medical center in Texas under the FEMA’s Public Assistance, Individual Assistance, and FEMA disaster grant programs. Our team has managed over \$1.5 billion in federal grant funds from the Federal Emergency Management Administration (“FEMA”) and emergency funding from the Department Housing and Urban Development (“HUD”), and has provided assistance with FEMA reimbursement, accounting, and compliance assistance under the Federal Stafford Act.

Past project include, but are not limited to the following:

Client	Engagement	Activity
City of Houston (“COH”)	Hurricane Katrina Oct 2005 - Sept 2007	Members of our team led the project management for the Joint Hurricane Housing Task Force (“JHHTF”) on behalf of the City of Houston. Activities included: <ul style="list-style-type: none"> • financial management • FEMA project worksheet development • grant management and forecasting • A-133 audit preparation, documentation management • vendor management • community outreach and agency liaison • internal and external communication

Client	Engagement	Activity
City of Houston (“COH”) as a subcontractor to Witt & Associates	Hurricane Ike Oct 2008 - Sept 2011	Members of our team project managed the financial reporting, grant accounting, and documentation retention for the City of Houston. Activities included: <ul style="list-style-type: none"> • financial operations and reporting • documentation management • grant management • accounting • A-133 Audit preparation • FEMA compliance and reimbursement
Houston Housing Authority (“HHA”)	FEMA Reimbursement Compliance Oct 2005 – Jan 2006	Members of our team managed the FEMA financial reimbursement and documentation management process on behalf of HHA in compliance with the Federal Stafford Act.
Harris County Housing Authority (“HCHA”)	Disaster Housing Assistance Program (“DHAP”) – Hurricanes Katrina and Ike Sept 2007 – Sept 2011	Members of our team led the project management of the DHAP project that included all operational functions within the program. Such activities included: <ul style="list-style-type: none"> • management • financial operations • accounting • customer service • quality assurance • compliance and investigations • vendor management • documentation management • A-133 audit preparation • information technology community outreach and agency liaison • internal and external communication
Housing Authority of New Orleans (“HANO”)	Disaster Housing Assistance Program (“DHAP”) – Hurricanes Katrina and Ike Sept 2007 – Sept 2011	Members of our team led the project management of the DHAP project that included all operational functions within the program. Such activities included: <ul style="list-style-type: none"> • management • financial operations • accounting • customer service • quality assurance • compliance and investigations • vendor management • documentation management • A-133 audit preparation • community outreach and agency liaison • internal and external communication

Client	Engagement	Activity
Memphis Housing Authority (“MHA”)	Disaster Housing Assistance Program (“DHAP”) – Hurricanes Katrina and Ike Sept 2007 – Sept 2011	Members of our team led the project management of the DHAP project that included all operational functions within the program. Such activities included: <ul style="list-style-type: none"> • management • financial operations • accounting • customer service • quality assurance • compliance and investigations • vendor management • documentation management • A-133 audit preparation • community outreach and agency liaison • internal and external communication
University of Texas Medical Branch Galveston (“UTMB”)	FEMA Grant Accounting and Financial Management Sept 2009 – Dec 2011	Members of our team led and project managed the following <ul style="list-style-type: none"> • financial operations and reporting • documentation management • grant management • accounting • A-133 Audit preparation • FEMA compliance and reimbursement

V. SENIOR MANAGEMENT STAFF

Laurie A. Robinson, MBA, is the managing principal for Project and Vendor Management Advisors, LLC (PVMA, LLC) located in Houston, Texas. Ms. Robinson has over twenty-two years of large-scale program and project management, regulatory compliance, internal audit, government affairs and policy experience in the healthcare, housing, and disaster management and recovery industries. Her experience comes from holding positions at the Office of Inspector General for the Department of Health and Human Services, Ernst & Young’s National Health Science Advisory Services Practice, Prudential Insurance Company of America, and two other accounting and consulting firms.

Since 2005, Ms. Robinson has managed over \$1.5 billion dollars in federal grant funds as the project director and then project principal for several healthcare, housing, social service, and disaster management projects sponsored by federal, state and local government agencies. Such agencies included, but not limited to the Federal Emergency Management Administration (FEMA), Housing and Urban Development (HUD), the Centers for Medicare and Medicaid Services (CMS), the City of Houston, Harris County Housing Authority, and the largest academic integrated healthcare delivery system in Texas.

Prior to becoming the Managing Principal for PVMA, LLC, Ms. Robinson was the lead principal for a Houston-based accounting and consulting firm where she led the firm's Consulting and Advisor Services Practice for the Houston, New Orleans, and Washington, DC offices. During this time she managed several disaster housing and disaster recovery projects across the country, a Medicare and Medicaid fraud unit, and FEMA reimbursement and accounting projects. She was also the key principal for the consulting practice's strategy and business development, and produced an average of \$15 million in revenue per year during her tenure with the firm.

From 2005 to 2011, Ms. Robinson led the project management, internal audit and external audit preparation for the City of Houston during its Hurricane Katrina and Rita emergency housing program developed for and resulting from one of the nation's largest national disaster in recent history. Such services included project management, internal audit, and FEMA compliance services. She continued the same type of services after Hurricane Ike, where she led and managed six disaster housing assistance programs (DHAP) and two national programs for several housing authorities. She and her team assisted over 60,000 families displaced by the Hurricanes with housing, rental payments, and social service case management.

Prior to 2005, Ms. Robinson served as the Legislative and Regulatory Liaison for the Office of Inspector General (OIG), Department of Health and Human Services in Washington, D.C., where she conducted day-to-day legislative and regulatory policy activities and initiatives on behalf of the inspector general. During this time she provided technical assistance to the United States Congress and other government agencies concerning auditing requirements for Medicare Part D, Medicaid, Medicare Advantage, and the State Children's Health Insurance Program (SCHIP).

Prior to the OIG, she was a Senior Manager with Ernst & Young LLP in its national Health Sciences Advisory Services practice since its initiation in 1998 for both the Houston and Washington, DC offices. Ms. Robinson was also a legal analyst and regional associate compliance manager for Prudential Insurance Company of America where she assisted in the development and implementation of its nation-wide healthcare legislative and regulatory tracking process and Central Region's Compliance Program. Her educational experience includes a BA from the University of North Texas, a post-baccalaureate certificate in advanced legal studies, and a MBA from the University of St. Thomas in Houston, Texas.

Jeffrey R. Helton, PhD, CMA, CFE, FHFMA is a project director with over 25 years of diverse experience in healthcare finance. As a Certified Management Accountant, a Certified Fraud Examiner, and a Certified Healthcare Financial Professional, he has the proven ability to organize healthcare facilities and restore positive financial results. As a former Chief Financial Officer in the healthcare industry, Jeff specializes in fraud auditing, reimbursement, internal audits, healthcare operations, and large scale project management leadership. Jeff is a subject-matter-expert for hospitals, managed care organizations, and government healthcare agencies.

Prior to joining PVMA, Dr. Helton was a director in MFR, P.C.'s Consulting and Advisory Services practice where he directed engagements in the healthcare and consulting practices. Prior to MFR, Dr. Helton was an engagement manager for Jefferson Wells International where he managed several healthcare and disaster management projects. Dr. Helton worked with Blue Cross/Blue Shield of Louisiana (BCBSLA) immediately after the Hurricane Katrina disaster in 2005. His team assisted the BCBSLA team in developing procedures to maintain claim and premium billing records that were compromised during the hurricane. He designed and developed contingency procedures that allowed BCBSLA to maintain an accurate accounting of enrollment, premium receivables/collections, and claim payments during a time when normal mail services for premiums and claims were severely curtailed in the New Orleans vicinity. These procedures were used to manage over \$70 million in commercial and Medicare Supplement premium receivables and \$55 million in claim payments in the 120 days following Hurricane Katrina.

The procedures used to develop contingency plans for BCBSLA during the aftermath of Hurricane Katrina were built off of the experience of our team's Associate Director - Dr. Jeff Helton - during his work as CFO of Humana Health Plan South Florida in the wake of the Hurricane Andrew disaster of 1992. In that experience, he developed and implemented backup procedures to maintain timely and correct premium billings, capitation payment and accounting, payroll and supply invoice accounting, cash management, and claims adjudication procedures. These procedures became a model contingency plan for Humana affiliates at that time, maintaining accurate accounting records for Medicare HMO and Florida Managed Medicaid beneficiaries after Plan offices were damaged following Hurricane Andrew.

Jeffery R. Helton earned his PhD in Healthcare Management at the University Of Texas School Of Public Health. He received his Masters in Health Administration from the University of Alabama at Birmingham and Bachelor of Business from Eastern Kentucky University. Jeff is the author of several publications including *Performance Normalization Using Data Envelopment Analysis*, *The Current State of Finance and Accounting Management in the Healthcare Industry*.

Kimberly Boyd is an experienced project manager, business communicator and organizational change consultant. With over 15 years of experience, she has successfully assisted Fortune 100 companies and public sector executives with business transformation initiatives to successfully communicate and effectuate change in light of a dynamic and ever changing marketplace.

Kimberly has been recognized by both the International Association of Business Communicators (IABC) and the Public Relations Society of America (PRSA) with awards for Communication Management and Strategic Communication Excellence. She has worked alongside top tier Information Technology (IT) and management consulting firms to lead communication and organizational change management efforts in the areas of; Corporate Communications, Human Resources and Benefit Communications, Information Technology (IT), Media/Investor Relations, Marketing, and Healthcare Compliance.

Skilled in Crisis Communications, Public Relations, and Community Outreach management, she was awarded the sub-contractor engagement to handle Public Affairs and Communication Management for the 2007 launch of the Disaster Housing Assistance Program (DHAP) for Harris County and the Greater New Orleans area. Under DHAP she created various targeted marketing tools for families, landlords and community groups, regulatory agencies, public and governmental officials, and property landlords on DHAP program availability and community resource needs, after Hurricanes Katrina and Rita. She was also responsible for the DHAP Katrina/Rita Public Information and Communications for the Memphis Housing Authority and to coordinate with the Department of Housing and Urban Development (HUD) for DHAP community outreach and program education for an additional 41 states within the US where a local housing authority was not administering DHAP.

In 2008 she continued as subcontractor for DHAP Public Information and Communication administrator under DHAP Gustav/Ike for Harris County and handled communication and outreach to the DHAP Katrina Transition programs, as the scope of her engagement under DHAP IKE expanded to include Federal Emergency Management Agency's (FEMA) Joint Information Center (JIC) appointed staffing and representation for DHAP and Harris County Emergency Preparedness.

To her public sectors experience, Kimberly adds a wealth and breath of communications experience in Human Resources and Employee Communications experience in Health and Welfare benefits, Total Reward packages and ancillary employee benefits offerings including Employee Assistance Program (EAP) offerings for large Fortune 100 companies with 45, 000 + employees.

A graduate of University of North Texas – she is a member of the Project Management Institute (PMI), International Federation of Employee Benefits and Pensions (IFEBC), Society of Human Resource Management, and Public Relations Society of America.

Lynn M. Allen is project manager for Project and Vendor Management Advisors, LLC (PVMA, LLC) located in Houston, Texas. Ms. Allen has over twenty years in curriculum development, instruction and management. Lynn specializes in the development and training of modules based on the Government Code of Federal Regulations (CFR) and Regulatory Compliance services. Prior PVMA, LLC, Ms. Allen worked for Continental Airlines as a reservations supervisor for over seven years and in their award winning training department for over ten years. She was responsible for the development and training of new and modified DOT Regulations and Customer Service to all reservation employees in the Houston office. Ms. Allen has developed and instructed curriculum on DOT Drug and Alcohol Awareness for supervisors and employees, as well as Designated Employee Representatives (DER) requirements for drug and alcohol program administration.

Ms. Allen has trained Housing & Urban Development (HUD) curriculum for the Housing Authority of New Orleans and provided regulatory compliance services for Harris County Housing Authority. Ms. Allen was the Project Manager for a portion of the Disaster Housing Assistance Program in New Orleans, Louisiana and was the Project Manager over the Emergency Rental Assistance Program of New Orleans. Ms. Allen is certified in National Incident Management Systems (NIMS).

A graduate of University of Houston – Clear Lake, Ms. Allen has a business degree in management and is a member of the American Society for Training and Development. Ms. Allen has training certifications in; Presentation Skills, Customer Service, Sales Service and DOT Drug & Alcohol Awareness.

VI. REFERENCES

Laurie Robinson, Management Principal for PVMA was the former contract Principal and Executive Project Director for all projects listed while she was the Director of Internal Audit for the former Jefferson Wells International (Houston) and the lead Principal over Consulting and Advisory Services for MFR, P.C. Many PVMA team members were project managers, project directors and project staff at JWI and MFR, P.C. from May 2005 to December 2011. Our team has maintained all relationships with these organizations and can provide references upon request.

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