

Healthcare Consulting Capabilities Statement

for

Project and Vendor Management Advisors, LLC ("PVMA")



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

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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

Mailing Office: • 4801 Woodway Drive, Suite 300 East, Houston, TX 77056 • Office (832)439-2351

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 world.

Our seasoned professionals have the knowledge, skills and capabilities to deliver value added, resource efficient and cost effective projects that will allow your staff to continue performing normal day-to-day work activities absent the concern that an important project will be delivered as expected -- *with quality, within budget and on-time.*

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 Drive, 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 OVERVIEW

Project and Vendor Management Advisors, LLC (“PVMA”) is a HUBZone and Women-Owned Small Business (“WOSB”) management consulting firm that provides professional services with an effective and proven Healthcare project management delivery framework to our public sector and private sector clients. PVMA employs seasoned Healthcare consultants and advisors who believe that good project management is an integral part and essential to any successful project initiative.

With over 20 years of Healthcare project management experience, the PVMA team has developed comprehensive knowledge, skills and capabilities to successfully deliver complex, large-scale, multi-state, and regulatory governed projects for our clients *on-time and within budget*. 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.

II. CORE CAPABILITIES

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

Professional Services Provided	Past Performance Experience
Project Management	✓ Medicare Program Integrity program implementation
Program Management	✓ Disaster Recovery - Social Service Case Management ✓ Program Operational and Compliance Reviews
Vendor Management	✓ Vendor contract monitoring and performance reviews
Internal and Fraud Auditing	✓ Medicaid and Medicare fraud audits and investigation
Government Affairs	✓ Technical Assistance to Congressional Staff and regulators concerning the Medicare and Medicaid Program and policy development

PVMA offers comprehensive management consulting services in the Healthcare industry. Members of our management staff are Healthcare “Subject-Matter-Experts” from years of hands-on operational and consulting experience. Our team has delivered successful Healthcare projects as project managers and management consultants, and we pride ourselves on providing innovate ideas and best-practices to our clients.

III. PAST PERFORMANCE EXPERIENCE

Project Example No. 1

Services Area:	Project and Program Management
Industry:	Healthcare
Key Strengths:	Ability to perform detailed Medicare fraud reviews that resulted in over \$400 million back to the Medicare Trust Fund
Program Years:	2009 to 2011
Program:	PVMA team members were part of the Houston based Medicare Zone Program Integrity Contract (ZPIC) for Zone IV as the local project manager and subcontractor of Health Integrity. Members of the PVMA team were employed by MFR, PC (sold in December 2012) during this project.
Activities:	Members of our team project managed the day-to-day activities of the ZPIC review nurses and coding specialist that performed medical record and coding reviews to determine if submitted reimbursements by providers were compliant with laws, regulations and Medicare billing rules, and to determine if billing submissions where fraudulent.

Project Example No. 2

Services Area:	Project and Program Management, Vendor Management, Regulatory Compliance, Finance, Accounting, Internal Audit
Industry:	Healthcare, Social Services, Disaster Recovery
Key Strengths:	Large Scale, Quick Start-Up, Regulatory Compliance

Program Years:	2009 to 2011
Program:	FEMA Accounting, Audit and Reimbursement Compliance
Government Agencies:	Largest Texas Academic Health Center and Medical School
Activities:	Following the destruction of Hurricane Ike, members of our team assisted our client with disaster recovery and rebuilding activities by evaluated internal controls on applicant's expenditure and FEMA reimbursement request, and developed tracking tools for progress of applicants' project. We managed FEMA obligated funds from requisition/PO/ to AP. Members of our team provided day-to-day accounting activities and conducted audit preparation activities to assist the client to prepare for multiple federal and state agency audits.

Project Example No. 3

Services Area:	Project Management and Government Affairs
Industry:	Healthcare, Social Service, emergency management
Key Strengths:	Large Scale, Rapid Start-Up, Regulatory Compliance
Program Years:	2007 to 2011
Program:	Social Service Case Management Program Oversight
Government Agencies:	Disaster Housing Assistance Program HUD/FEMA/PHAs
Activities:	Following Hurricanes Katrina and Ike, members of our team designed and implemented a case management program to assist Hurricane evacuee with healthcare, mental health, housing and other social services needs to assist them back to self-sufficiency. Our team recruited, contracted and managed over 22 social service agency vendors that provided direct-care services to the evacuees. Our team developed and implemented program policies and procedures and implementation of case management software to track the progress of program participants (evacuees).

IV. KEY SENIOR MANAGEMENT STAFF

Laurie A. Robinson is the managing principal for Project and Vendor Management Advisors, LLC (PVMA) 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, 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.

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 (CHIP).

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.

Jeffry R. Helton is an Associate Director Project and Vendor Management Advisors, LLC (PVMA) 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.

Jeff was a Director at MFR, P.C. where he managed the Healthcare practice for the firm. Jeff also served as the Chief Financial Officer at Doctors Hospital Parkway and Tidwell where he led substantial financial turnaround of two hospital systems which resulted in bringing the hospital out of bankruptcy and into an operating profit exceeding one million dollars. Prior to his works at Doctors Hospital, he provided consulting leadership as the Engagement Manager at Jefferson International. Jeff Helton has held the title of Chief Financial Officer for Bear Valley Community Healthcare District, Victor Valley Community Hospital, and Tenet Healthcare Corporation. His responsibilities at these organizations included leading all financial operations, financial/investment analysis and leading several financial turnarounds.

Currently, Jeff is an Assistant Professor in the Division of Management, Policy, and Community Health at the University of Texas, Houston. His research interests include evaluation of technology impacts on operational efficiency in hospitals, rural and safety net health care delivery systems, health care fraud, and bankruptcy and insolvency in health care entities. In addition, Helton is also a Fellow of the Healthcare Financial Management Association.

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*.

Steven A. Smith, PMP, is a project manager with Project and Vendor Management Advisors, LLC (PVMA), with over 11 years performing project management responsibilities throughout full project life cycle and over 15 years of business analysts experience gathering, analyzing, and documenting requirements for multiple information system application implementations, Mr. Smith has an innate ability to learn new technologies and methodologies quickly, strong communication skills, and works well as a team builder and participant.

Mr. Smith has five years of experiences working on projects under Big 4 Consulting oversight and methodologies and served as lead Consultant/Business Analyst during implementation of web-based fully integrated ERP/Financial System (Advantage Financial 3.5) for the City of Dallas and the City of Houston. He has performed duties as Subject Matter Expert (SME) for Cost Accounting, Accounts Receivables, Accounts Payable, and Purchasing modules. Responsibilities included gathering requirements for process changes, prototyping system functionality within business processes, writing specifications for conversions and interfaces, and developing and conducting end-user training. In addition, Mr. Smith was contracted to perform as acting Information Systems Director for the City of Houston Controllers Office managing a staff of over 20.

Mr. Smith also served as Payroll Consultant/Project Manager during implementation of web-based fully integrated Human Resource and Payroll System (Advantage HRM 3.7) for County of Wake, City of Midland, and Aldine Independent School District. In addition, he performed consulting and managed the efforts during the following phases of the projects: Software Configuration, Conversion Data Mapping, System Testing, User Acceptance Testing, Issue Resolution, and System Administration Training using Agile development methodologies. He assisted clients with validation and analysis of parallel payroll data between existing payroll system and Advantage HRM 3.7 payroll system, and played an integral role planning and implementing new business policies and system operating procedures.

Technical skills include: Platforms - UNIX, Windows Server, IBM Mainframe, Windows Operating Systems; Databases- Oracle, SQL Server, VSAM, DB2, Adabase; Software - Oracle Purchasing, MS Office Suite, HP Quality Assurance, MS SharePoint CGI-AMS Advantage; Tools - Oracle SQL Developer, Toad Utilities, Easytrieve, Xpediter, FileAid, IBM Utilities; Languages - SQL, NATURAL, MICRFOCUS, COBOL, MVS/JCL, CICS.

Mr. Smith graduated from Northern Illinois University in DeKalb, IL with a Bachelor of Science in Computer Science and a Minor in Mathematics. He also has a Project Management Professional Certification (PMP) from Project Management Institute and has a Six Sigma certification in Total Quality Applications.



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