

Project Management Capabilities Statement

FOR

Project and Vendor Management Advisors, LLC

("PVMA")



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

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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

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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 world.

Our seasoned professionals have the knowledge, skills and capabilities to deliver value added, resource efficient and cost effective projects that allows our clients 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, Texas 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”) www.pvmallc.com is management consulting firm that provides professional services and an effective and proven project management delivery framework to our public sector and private sector clients. PVMA employs seasoned 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 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.

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. Since 2005, our team has been trusted to manage over \$1.5 billion in federal grant 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 that proves to be cost effective and more efficient for our clients.

Our professional services include:

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

III. INDUSTRY EXPERTISE

Our comprehensive consulting and advisory services cross several industries and members of our management staff are “Subject-Matter-Experts” in their industry fields a designation gained from years of hands-on experience. Our team has delivered successful projects as project executives, directors, and managers in each of the following industries:

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

As Subject-Matter-Experts and project managers, we provide innovate ideas and best-practices to our clients by continuously seeking new skills, techniques, and education in several industry areas.

IV. PAST PERFORMANCE EXPERIENCE

Project Example No. 1

Services Area:	Project Management, Vendor Management
Industry:	Public Sector Housing and Emergency Management
Key Strengths:	Large Scale Project, Multi-State, Rapid Start-Up
Total Funds Managed:	\$400 million
Program Years:	2007 to 2011
Program:	Disaster Housing Assistance Program – Rental HUD/FEMA/PHAs
Activities:	Program and Project Management, internal and external communication and outreach, media and public relations, community outreach, financial operations and accounting, quality assurance, internal auditing and regulatory compliance, and document and records management

Project Example No. 2

Services Area:	Project/Program Management, Vendor Management, Regulatory Compliance, Finance, Accounting, Internal Audit
Industry:	Public Sector Housing, Emergency Management, Regulatory Compliance
Key Strengths:	Large Scale, Quick Start-Up, Regulatory Compliance
Total Government Funds Managed:	\$1 Billion
Program Years:	2005 to 2011
Program:	FEMA reimbursement and compliance, accounting, internal auditing, records and documentation management
Government Agencies:	City of Houston and Largest Texas Academic Health Center and Medical School
Activities:	Evaluate internal controls on applicant's expenditure, project management, FEMA compliance, development of tracking tools for revenue forecasting and monitoring, manage grant funds from requisition/PO/to AP, and planned emergency preparedness procurement contracts

Project Example No. 3

Services Area:	Project Management and Regulatory Compliance
Industry:	Public Sector Healthcare, Social Service
Key Strengths:	Large Scale, Rapid Start-Up, Regulatory Compliance
Total Government Funds Managed:	\$ 200 Million
Program Years:	2007 to 2011
Program:	Social Service Case Management Program Oversight
Government Agencies:	Disaster Housing Assistance Program HUD/FEMA/PHAs

Activities: Designed case management program, project management, contract performance monitoring of social service agency providers, developed and implemented program policies and procedures, implementation of case management software, and vendor oversight.

V. KEY SENIOR MANAGEMENT STAFF

Laurie A. Robinson 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.

Beginning in 2005 to 2011, Ms. Robinson led the 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 (2) 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 is an Associate Director Project and Vendor Management Advisors, LLC (PVMA, LLC) 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, LLC), 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.

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 (IFEBP), 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 is a seasoned trainer with over twenty years experience in curriculum development, instruction and management. Ms. Allen specializes in the development and training of modules based on the Government Code of Federal Regulations (CFR) and Regulatory Compliance services. Prior to her current consulting role, Ms. Allen worked for Continental Airlines (now United Airlines) as a reservations supervisor for over seven (7) years and in their **award winning training department** for over ten (10) years. Ms. Allen trained airport sales agents on new systems software and was responsible for the development and training of new and modified Department of Transportation (DOT) Federal Regulations and Customer Service to all reservation employees in the Houston office. Ms. Allen developed and instructed curriculum for DOT Drug & Alcohol classes for supervisors and employees. She also trained Designated Employee Representatives on DOT requirements for administering drug & alcohol programs.

Ms. Allen has trained Housing & Urban Development (HUD) curriculum, Administrative Plan, Call Center and Customer Service techniques for the Housing Authority of New Orleans (HANO). She also has provided multiple trainings including customer service, HUD compliance and regulations, and Administrative Plan training for Harris County Housing Authority. Ms. Allen also assisted in the management of the Disaster Housing and Assistance Program in Houston, Texas and New Orleans, Louisiana. In addition, she was a project manager for the Emergency Rental Assistance Program in New Orleans.

A graduate of University of Houston – Clear Lake, Ms. Allen has a bachelor's degree in Business 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, DOT Drug & Alcohol.



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