



Request for Qualifications  
NO. CMGR-180051-GD

**Proposal to Provide  
Management Consultant Services to  
the City of Gainesville**



**Proposal Submitted by:**

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**Proposal Submitted on:**

February 8, 2018 by 3:00 p.m.



February 8, 2018

Procurement Division  
City Hall, Room 339  
200 East University Avenue  
Gainesville, FL 32601

To whom it may concern:

Berry Dunn McNeil & Parker, LLC (BerryDunn) is pleased to submit this proposal to the City of Gainesville (City) in response to its Request for Qualifications (RFQ) No. CMGR-180051-GD for Management Consulting.

BerryDunn is a management and information technology (IT) consulting and certified public accounting firm serving clients nationally. Our consulting group is dedicated to serving state, local, and quasi-governmental agencies, and higher education entities in all 50 states and in Canada.

The following points highlight the strengths BerryDunn's team brings to the City:

- Our team is made up of **highly experienced project managers, consultants, and subject matter experts** who utilize smart practices, draw upon their experiences working with public sector agencies, and bring their extensive knowledge base to projects.
- As an independent consulting firm, we do not sell or develop hardware or software, nor do we partner with systems vendors. This means we will work **only in the best interest of the City**.

As a principal and the leader of BerryDunn's Local Government Consulting Practice Area, I am authorized to commit BerryDunn to the services proposed herein. We have read the RFQ and addenda, we understand them, and we agree to the terms and conditions therein. We also agree to comply with the federal regulations in the forms contained in the solicitation document.

Should you have any questions, you may contact me directly at 207-541-2294 or [csnow@berrydunn.com](mailto:csnow@berrydunn.com). We appreciate the opportunity to submit this proposal and look forward to working with the City.

Sincerely,

A blue ink handwritten signature, appearing to read 'Chad Snow', written over a light blue horizontal line.

Chad Snow, PMP  
Principal

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## 1.0 Project Understanding and Approach

The City of Gainesville is seeking statement of qualifications from firms and individuals providing management consulting, with the ultimate goal of assisting the City to become more citizen-centered. From the pool of applicants, the City will select qualified firms or individuals to contract with the City for such services. If selected, BerryDunn would respond to City requests for specific project proposals promptly and without delay.

Of the City's management areas, BerryDunn is qualified to demonstrate experience in the following:

### Area 3 – Technology (Information, Data Collection, Citizen Engagement, etc.)

### Area 4 – Project Management

We believe that the following points make BerryDunn a qualified candidate to provide a variety of consulting services to the City.

- ☑ **We have demonstrated experience in the anticipated scope of services.** BerryDunn's team is currently engaged in multiple states providing management consulting services for IT system assessment and planning, technology upgrade/migration, project management, business process improvement, procurement, and IV&V for public sector agencies. With 120 consultants in our Government Consulting Group, we have the breadth and depth of experience to effectively serve the City. In addition, we are able to draw on the expertise of numerous other individuals in our firm. This depth provides the City with the backing and security they require for their projects.
- ☑ **We offer demonstrated project management experience.** Our proposed project team has managed contracts for diverse municipalities. We have adopted Project Management Institute (PMI) best practices for all consulting engagements and every engagement is led by an experienced project manager.
- ☑ **We have worked extensively at both the municipal level.** We have experience with most of the business processes and information systems used with local agencies across the country. Additionally, we understand the regulations, mandates, and constraints that must be considered when managing for agencies and their constituents.
- ☑ **We are independent and objective advisors.** As an independent consulting firm, BerryDunn does not develop or sell hardware or software, nor do we partner with system vendors. Our independence make us especially qualified for work that requires an objective advisor, including project management, analysis, and quality assurance.
- ☑ **We choose the right projects.** A unique feature that differentiates BerryDunn from many of our competitors is our strategic approach to selecting the *right projects* to undertake. We manage our growth carefully and choose projects in which we believe we can make a significant difference for our customers.

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## 1.1 Our Approach and Tools

### Project Management Approach

For the day-to-day management and undertaking of project tasks, we strive to avoid unnecessary delays, ensure quality assurance, enhance productivity, promote collaboration, and minimize barriers to participation. To that end, we employ software familiar to most users. Our standard toolset includes the following:

- ☑ **BerryDunn KnowledgeLink (web-based project document repository):** BerryDunn has established BerryDunn KnowledgeLink, a customized Microsoft SharePoint tool, to secure and share project documentation and facilitate secure online communication and collaboration between BerryDunn and the customer's team. This application contains the ability to maintain online project calendars, maintain lists of project team members and contact information, and serve as a repository for documents created throughout the engagement.
- ☑ **Microsoft Word and Excel:** Most of our deliverables are developed using these common software applications.
- ☑ **Adobe Acrobat:** We will provide "final" documents in Adobe PDF format, as this format allows documents to be easily shared with project stakeholders without concern that documents have been altered. This file format also allows recipients to access and read the deliverable documents without having to license specific Microsoft software products.
- ☑ **Microsoft Project:** We use Microsoft Project to develop and maintain project schedules. Where licensing constraints present a barrier, BerryDunn can easily provide an alternative format such as PDF for ease of client access. In addition, all proposed project managers are familiar with Microsoft Project and using it to manage engagements.
- ☑ **Microsoft PowerPoint:** We use PowerPoint primarily for communicating key information during presentations and training sessions. In addition to displaying the PowerPoint presentation on a display screen, we provide handouts of the presentation for participants.
- ☑ **Microsoft Visio:** We use Visio for the development of flowcharts, organization charts, and business process diagrams, and we typically provide customers with final versions in both Visio and PDF formats to facilitate future updates.
- ☑ **Teleconference Bridge, Videoconference, and Recording:** BerryDunn routinely used both web conference and teleconference technology to facilitate remote meetings with clients and partners.

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## Quality Management Approach

Our approach to Quality Management includes the following activities:

- ☑ **Quality Management Planning:** In collaboration with the customer and the firm's business and technical analysts, BerryDunn's project manager will identify quality standards relevant to the project and determine how to satisfy them.
- ☑ **Quality Assurance:** The BerryDunn project manager will evaluate overall project performance and project deliverables on a regular basis to ensure understanding of and compliance with the approved Quality Management Plan, and will work with the customer to eliminate causes of unsatisfactory performance.
- ☑ **Quality Control:** The BerryDunn project manager, in collaboration with firm analysts, will monitor specific project results and deliverables to determine compliance with relevant quality standards.

## Change Management Approach

Our team utilizes Prosci's® proven change management methodology across all projects. A central focus of the Prosci® change management approach is the belief that in order for change to work in an organization, individuals must be willing to change and understand change. BerryDunn's change management methodology for project initiatives involves the following three key stages:

1. **Preparing for Change** begins with the development of an agreed-upon project work plan, based on input from client stakeholders on the existing environment.
2. **Managing Change** involves overseeing assigned roles and tasks, providing training and coaching, using tools effectively, and executing a clear communication plan.
3. **Reinforcing Change** involves evaluating action plans, reviewing the sustainability of change management activities, and promoting individual and team successes.

We strive to be flexible when it comes to development and execution of an effective project plan. We understand that no two projects are exactly alike and believe that one of the primary reasons we have been successful with similar projects is our willingness to be flexible in adapting to our clients' unique needs. Our team is skilled at leading individuals through the process of preparing for change. This preparedness can provide additional value in future phases of a technology initiative, as individuals embrace change and become vested in project activities.

## 2.0 Proposed Project Staff

As requested in the City's RFQ, we have provided resumes on the following pages that are representative of the experience and subject matter expertise offered by BerryDunn's 120-person Government Consulting Group, as well as our ability to provide appropriate staff resources for projects related to each category for which we have proposed.

**Representative Resume for  
Area 3: Technology  
Area 4: Project Management**

**KEITH DAMON ♦ MANAGER ♦ PMP ♦ Prosci® CCP**

Keith is an experienced project manager with more than 12 years of experience working with public sector agencies to manage enterprise applications. As a project manager for the public sector group within J.D. Edwards, he worked exclusively with government customers. Complimenting this experience, Keith has 17 years' experience working in municipal government as an information technology (IT) director. He has significant management experience within large and diverse government organizations, uniquely qualifying him to assist BerryDunn's government clients.

**Qualifications and Experience**

- ✓ **Project Management of IT Assessments:** Keith has provided project management for many of BerryDunn's IT assessment or strategic planning projects, including engagements with Loudoun County, Virginia; Blue Valley Schools in Kansas; and the Town of Farragut, Tennessee. All of these projects have involved fact-finding, analysis, and prioritization of issues related to IT infrastructure, systems, processes, procedures, staffing, training, financial resources, or service delivery.
- ✓ **Public Sector IT Management:** Keith brings a wealth of knowledge in the management of municipal IT operations from his prior role as IT director for the City of Keene, New Hampshire. He was responsible for all aspects of the City's IT environment, including staffing, training, hardware, software, policy, support, and the selection, implementation, change management, and maintenance of all City systems.



**Education**

- ❖ BS, Computers and Management, Franklin Pierce College

**Certifications**

- ❖ Project Management Professional (PMP), Project Management Institute
- ❖ Information Technology Infrastructure Library (ITIL) Foundation Certified
- ❖ Prosci® Certified Change Practitioner

- ✓ **Project Management:** Keith has extensive experience in managing, planning, and implementing ERP systems, both as the customer and as the vendor. This perspective and insight benefits our ERP consulting clients across the country. He has led many business process improvement activities and strategic planning sessions, and has assisted with organizational change management, which is a critical success factor for any large-scale implementation project.

### Prior Organizational Experience

**Oracle/PeopleSoft/J.D. Edwards:** Keith served as Oracle's engagement manager, with responsibility for overseeing more than 30 public sector implementation projects, working with regional sales managers to develop tools to address customer needs, and providing consulting assistance for customers and partners. He also managed PeopleSoft implementations for government clients, as well as J.D. Edwards upgrade initiatives, which involved performing upgrade planning sessions and preparing customers to migrate to the current version of the software.

**City of Keene, New Hampshire:** Keith served as director of IT for the City. In this role, he oversaw all aspects of IT for all City departments, including planning for the City's technology needs, and implementing and supporting all technology initiatives. During his tenure, Keith led the implementation of Pentamation's ERP software; developed standards for all hardware and software for the City; managed technical staff; ensured responsive support for all City computer users; managed conversion, implementation, and training for new systems; developed Request for Proposals (RFPs); and led vendor negotiations.

### Keith's Key Clients

The following list is a representative sample of BerryDunn clients Keith has assisted with IT and management consulting engagements.

- City of Boca Raton, Florida
- City of Coral Springs, Florida
- Carroll County, Maryland
- City of Allen, Texas
- City of College Station, Texas
- City of Ormond Beach, Florida
- City of Mesquite, Texas
- Loudoun County, Virginia
- Minnehaha County, South Dakota
- Town of Farragut, Tennessee



## Representative Resume for Area 3: Technology

### **BEN ROPER ♦ SENIOR CONSULTANT ♦ MBA, CGCIO**

Ben is a former city information technology (IT) director with more than 25 years of experience working with local government agencies and extensive experience assisting public sector entities in planning, problem solving, and service delivery. He has demonstrated skills in enhancing operating efficiency and maximizing use of limited resources, and is an accomplished IT leader with exceptional skills in collaboration, strategic alignment, project management, requirements definition, and systems delivery that exceeds customer and organization objectives.

#### **Qualifications and Experience**

- ✓ **Information Technology.** Ben's extensive background in local government IT leadership positions affords him knowledge of technology, best practices, and common challenges in the field. He has served in multiple leadership positions include as IT director for the City of College Station, Texas.

#### **Prior Organizational Experience**

**City of College Station, Texas:** During his tenure as IT director, Ben directed six divisions totaling 29 personnel providing voice and data services, switching and direct user support, infrastructure and communications facilities support to a city staff of more than 900 and serving a community of more than 100,000 citizens. In his position, Ben developed and implemented capability for council members to remotely participate in city council meetings, preserving and enhancing representative government. He also initiated a system review that resulted in solicitation, selection, and implementation of a new Enterprise Planning Resource (ERP) system. Ben led the project as one of three members of the Executive Committee. The City was awarded four Technology Excellence Awards by the Texas Association of Governmental Information Technology Managers (TAGITM) during Ben's time there. In addition, Ben developed the City's first IT Strategic Business Plan to ensure that IT projects and solutions were strategically aligned with



#### **Education**

- ❖ BS, Stephen F. Austin State University
- ❖ MBA, Sam Houston State University
- ❖ MS, Systems Technology, Naval Postgraduate School
- ❖ MS, Engineering Science, Naval Postgraduate School

#### **Certifications**

- ❖ Certified Government Chief Information Officer (CGCIO)

City Council priorities and initiatives and implemented the Information Technology Council to improve information flow and ensure that technology initiatives supported business units.

**United States Fleet Forces Command:** In his role as Deputy Director for Communications, Ben directed day-to-day operations for a staff of more than fifty personnel providing communications planning, policy, and oversight for the U.S. Navy Fleet and 13 major shore installations across the eastern United States, and a headquarters staff of 700. Ben acted as project manager for the Naval Tool for Interoperability and Risk Assessment (NTIRA) development and developed an automated software tool that was adopted to improve communications and network systems installation and management for entire Navy fleet.

**United States Sixth Fleet:** Ben served as assistant chief of staff for communications in Gaeta, Italy. In this position, he directed satellite, microwave, cellular, and terrestrial communications infrastructure for fixed and mobile users over an area that reached from North Africa to Northern Europe and Spain to the Middle East. He also managed 42 personnel directorate and a \$250,000 operating budget. Ben coordinated resource allocations for all subordinate commands.

### Ben's Key Clients

The following list is a representative sample of BerryDunn clients Ben has assisted with IT and management consulting engagements.

- City of Weatherford, Texas
- City of Irving, Texas
- City of Richland, Washington

## Representative Resume for Area 3: Technology

### **MATTHEW BRIA ♦ SENIOR CONSULTANT ♦ PMP**

Matthew is an experienced information security, technology leader, and subject matter expert in information security and governance. He possesses a strong knowledge and understanding of security analytics, ERP security, network and cloud security, security architecture, security governance, risk assessments and compliance.



### **Qualifications and Experience**

- ✓ **IT Security:** Matthew has served as the director of IT Security for previous organizations, responsible for all aspects of enterprise wide security organization, and enterprise production change management for a multi-billion dollar retail and wholesale organization. He had direct management of a team responsible for enterprise security architecture, Identity and Access Management, IPS, Multi Factor Authentication, Advanced Malware detection, Security Analytics, Forensics, DLP, Incident Response, and endpoint protection. In addition, he was responsible for the implementation of enterprise-wide security metrics, security policy, as well as the formation of an executive security steering committee.
- ✓ **ERP Implementation:** Matthew has experience in the procurement, design, and implementation of SAP role-based application security for a user base of 10,000. He has managed a large scale, cross-organizational SAP ECC 6.0 implementation and continued support packs, consisting of FI/CO, AR, AP, GL, MM and warehouse.

### **Prior Organizational Experience**

**TBC Corporation:** As the director of IT Security, Matthew served as the highest-ranking security leader in the organization, reporting directly to CIO, responsible for all aspects of enterprise-wide security organization, and enterprise production change management for a multi-billion dollar retail and wholesale organization. He had direct management of a team responsible for enterprise security architecture, Identity

### **Education**

- ❖ BS, Management Information Systems, Salve Regina University

### **Certifications**

- ❖ Project Management Professional (PMP), Project Management Institute
- ❖ Certified Information Systems Security Professional (CISSP)

### **Professional Affiliations**

- ❖ The International Information System Security Certification Consortium (ISC)<sup>2</sup>

and Access Management, IPS, Multi Factor Authentication, Advanced Malware detection, Security Analytics, Forensics, DLP, Incident Response, and endpoint protection. In addition, he was responsible for the implementation of enterprise-wide security metrics, security policy, as well as the formation of an executive security steering committee.

**GTECH Corporation West Greenwich:** As a project manager and software engineer, Matthew provided project management for complex multi-tiered implementations consisting of software development, marketing, new communications networks, and web based system architecture. He led all project meetings with SME/leads from each discipline: Software, Infrastructure, Finance, Product Development, Training, and Marketing. He also led cross-organizational efforts defining change management, issue tracking systems, operational procedures, and training needs.

Additionally, Matthew developed stored procedures, triggers, scripts, performance tuning, and reports to enhance and support a complex multi-tiered system with SYBASE database for multiple Lottery project implementations. He also administered and configured Sybase SQL Server and Sybase Replication Server. He provided engineering support of quality assurance testing, functional requirement specifications, data dictionaries, white papers, and project plans.

### Matthew's Key Clients

The following list is a representative sample of BerryDunn clients Matthew has assisted with IT and management consulting engagements.

- City of Long Beach, California
- Metropolitan Government of Nashville & Davidson County, Tennessee
- Washington State Auditor's Office
- Lewiston, Public Schools, Maine

## Representative Resume for Area 3: Technology

### **MATTHEW TREMBLAY ♦ CONSULTANT**

Matthew has experience in financial and organizational management in both the public and private sectors. In the private sector, he has created and administered budgets; managed complex facilities; and has leveraged technology to create more efficient and effective operations. In the public sector, he served in Washington, D.C., as a policy advisor to a United States senator. Given his experience, Matthew is able to offer clients a comprehensive perspective.



### **Qualifications and Experience**

- ✓ **Operational and Financial Efficiency:** As general manager for the Unity Food Hub, Matthew coordinated staff and logistics to ensure exceptional customer service and operational efficiency throughout the entire value chain. He identified and implemented technology solutions in order to streamline operations and increase profit margins. During his time as a nonprofit financial administrator, Matthew renegotiated service contracts, reduced fixed and variable expenses, and implemented an online contribution platform that resulted in multi-year budget surpluses.

### **Prior Organizational Experience**

**Unity Food Hub:** In his role as general manager, Matthew was responsible for the creation and implementation of the operational business plan for the Unity Food Hub. The primary function of the Unity Food Hub is to purchase food from producers in the State of Maine and directly sell to consumers and wholesale customers in northern New England. He managed the \$1.8 million, 15-month historic rehabilitation of the Unity Food Hub's headquarters, which received an Honor Award from Maine Preservation in 2015.

**St. John's Lutheran Church:** As financial administrator, Matthew managed the budget and accounting functions for the church and early childhood education center. He directed facility maintenance, supervised contractors, implemented a capital reserve study, and managed the execution of capital investments in excess of \$100,000. In addition, he advised on

### **Education**

- ❖ BA, Finance, Bentley University

the creation of, and administered, employee benefits and human resource policies for staff.

**Arcadia Center for Sustainable Food & Agriculture:** In his role as Arcadia Food Hub manager, Matthew created the business plan as an enterprise for a dynamic startup nonprofit organization. The mission of the Arcadia Food Hub was to purchase food directly from local farms and sell it to restaurants, schools, and hospitals in the greater Washington, D.C., metropolitan area. Matthew identified and collaborated with area organizations and individuals, conducted market analysis, and identified needed infrastructure to launch the enterprise.

**Office of United States Senator Susan Collins:** As a legislative assistant, Matthew was the principal policy advisor for agriculture and second amendment issues. His responsibilities included making policy recommendations; monitoring, introducing, and advancing legislation; and preparing materials for the senator for floor presentations, speeches, hearings, office meetings, and state events.

### Matt's Key Clients

The following list is a representative sample of BerryDunn clients Matt has assisted with IT and management consulting engagements.

- City of Boca Raton, Florida
- City of Coral Springs, Florida
- City of Dover, Delaware
- City of Farmers Branch, Texas
- City of Gahanna, Ohio
- City of Independence, Missouri
- City of Wilmington, North Carolina
- Gallatin County, Montana
- Saginaw County, Michigan
- Somerset County Park Commission, New Jersey
- Three Rivers Park District, Minnesota

## Representative Resume for Area 3: Technology

### MEGAN O'BRIEN ♦ CONSULTANT ♦ MPP

Megan is a consultant in BerryDunn's Government Consulting Group with experience as a business analyst serving local clients. She has worked in nearly every level of government: city, county, state, and federal. Her experience includes performance auditing, business process analysis and improvement, benchmarking research, and strategic goal setting.



### Qualifications and Experience

- ✓ **Enterprise System Selection:** Megan is experienced in facilitating work sessions with stakeholders, observing business processes, and reviewing documentation to elicit useful information about an organization's needs, as well as translating those needs into comprehensive functional and technical requirements. She has assisted in the development of RFPs, review of vendor proposals, and facilitation of vendor demonstrations as BerryDunn clients go through the system selection process.
- ✓ **Enterprise System Implementation:** Megan has assisted in conducting implementation assessments, such as go-live readiness assessments. Megan has also worked on quality assurance audits for system implementation projects. She is currently working on a quality assurance project for an ERP system implementation project with the City of Long Beach.
- ✓ **Business Process Analysis:** As an intern for the City of Phoenix and Department of Economic Security, Megan documented business processes in the form of Microsoft Visio diagrams and narrative descriptions. She has experience in facilitating fact-finding interviews and business process review sessions to develop shared understanding of current processes, as well as buy-in for future recommendations. Megan recently led business process diagram mapping sessions for the City of Fredericksburg, Virginia; City of Coral Springs, Florida; and Gallatin County, Montana as part of ERP system selection projects.

### Education

- ❖ MPP, Arizona State University
- ❖ BA, Political Science, Bryn Mawr College



### Prior Organizational Experience

**Arizona Office of the Auditor General:** In her role as a performance auditor, Megan wrote audit programs, analyzed data, interviewed agency staff, reviewed literature, interpreted policies and statutes, and synthesized audit information into well-documented work papers in compliance with government audit standards. She also formulated findings and appropriate recommendations based on audit evidence; summarized complex evidence, findings, and recommendations into concise reports; and communicated audit progress to the audited agency.

**City of Phoenix:** As a public works solid waste intern, Megan lead a project to document business processes related to public works, which included facilitating meetings with staff and management, creating flowcharts and narratives, and presenting recommendations to management. She assisted management in creating goals for the solid waste section of the City General Plan by researching other cities and presenting recommendations to the solid waste leadership team.

**Department of Economic Security:** Megan, as an Office of Accountability intern, created work plans and deliverable templates for fraud; complaint management; strengths, weaknesses, opportunities, and threats (SWOT) analysis; and business process improvement projects within the department. She documented business processes in Microsoft Visio by conducting interviews; researching, analyzing, and summarizing data; and presenting findings and recommendations to management.

### Megan's Key Clients

The following list is a representative sample of BerryDunn clients Megan has assisted with IT and management consulting engagements.

- City of Coral Springs, Florida
- City of Boulder, Colorado
- City of Cedar Hill, Utah
- City of Chaska, Minnesota
- City of Fredericksburg, Virginia
- City of Glendale, Arizona
- City of Irving, Texas
- City of Long Beach, California
- City of Santa Fe, New Mexico
- City of South Jordan, Utah
- Gallatin County, Montana
- Pitkin County, Colorado
- Scott County, Minnesota
- Spokane Public Schools, Washington
- City of Weatherford, Texas



## Representative Resume for Area 3: Technology

### ALEX KEE ♦ CONSULTANT ♦ MPPM

Alex has more than six years of experience working with local government agencies and extensive experience assisting public sector entities with planning and community development. This has afforded him with a unique skillset catering to serving public sector clients.

#### Qualifications and Experience

- ✓ **Community Development:** As a former city planner for the City of Westbrook, Maine, Alex has direct experience with many facets of public sector planning and community development.

#### Prior Organizational Experience

**City of Westbrook, Maine:** In his role as City Planner, Alex was responsible for assisting developers, contractors, and the general public in understanding planning-related items and processes. He was also responsible for the coordination of the planning review process, review of applications, and facets of the approval process.

**City of South Portland, Maine:** As a City Management Associate, Alex was responsible for budget and financial analysis and management as well as customer service and general support of municipal operations. In addition, Alex applied research techniques, survey methods, and data collection for the City manager and council.

**Prudential Financial.** As a Disability Claims Manager, Alex was the project manager for the claims process from beginning to end and provided customer service and knowledge with regards to policy information.



#### Education

- ❖ Masters in Policy, Planning and Management, University of Southern Maine
- ❖ BA, Sports Management and Political Science

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### **Alex's Key Clients**

The following list is a representative sample of BerryDunn clients Alex has assisted with management consulting engagements.

- City of Manassas, Virginia
- Town of Wells, Maine
- Outagamie County, Wisconsin

**Representative Resume for  
Area 3: Technology  
Area 4: Project Management**

**CLARK LATHRUM □ SENIOR CONSULTANT**

Clark is an experienced Chief Information Officer (CIO), IT director, and project manager with more than thirty years in the public sector managing, developing, enhancing, testing, and implementing diverse software applications and complex infrastructure projects. He applies his skills to help government customers capitalize on opportunities through technology and process improvement that align with government objectives and business goals. He is a past member of the State of Arizona CIO Council.



**Qualifications and Experience**

- ✓ **Project Management:** Throughout Clark's 25-year career in the public sector, he has managed a diverse set of projects. This experience contributes in his ability to balance stakeholder requirements to achieve project objectives. In his most recent position with the State of Arizona, Clark provided project oversight for the Business Reengineering Arizona (BREAZ) project. BREAZ is a statewide initiative to transform Arizona's business processes and the replacement of the State's legacy accounting system with CGI ERP. His oversight responsibilities included project monitoring and reporting to interested stakeholders such as the State CIO, Information Technology Authorization Committee (ITAC), and Joint Legislative Budget Committee (JLBC).
- ✓ **Leveraging Technology for Process Improvement:** During his tenure with the Arizona Corporation Commission, Clark developed and implemented technology strategic plans, goals, objectives, and budgets to meet agency objectives. He successfully drove the technology component of process-improvement initiatives for the agency and, through ongoing collaboration with agency executives and senior management, identified opportunities for expanded integration of technology into business processes.

**Education**

- ❖ Computer Information Systems, Rio Salado College
- ❖ Administrative Management, Arizona Government University

**Associations**

- ❖ International Association of Commercial Administrators (IACA)
- ❖ State of Arizona CIO Council – Past Member

### Prior Organizational Experience

**Arizona Department of Administration:** As an engagement manager, Clark served as a consultant to stakeholder agencies by advising them in the areas of strategic planning, development of project objectives, business cases and requirements, project management, budgeting, and reporting. In this role, he was a key team member of multiple department lean transformation initiatives.

**Arizona Corporation Commission:** As CIO and chief information security officer, Clark provided technology vision, leadership, and strategy with a focus on improving operational efficiency, reducing operational costs, and increasing technology availability. During his tenure, he established a centralized agency-focused IT organization; mentored numerous project managers, application developers/programmers, and business analysts; and established a PMO that streamlined project delivery and implementation.



**Representative Resume for  
Area 4: Project Management**

**CHAD SNOW ♦ PRINCIPAL ♦ PMP, CFE**

Chad has more than 27 years of experience working with local government agencies and has extensive experience assisting government clients with project management, technology planning, business process improvement, system implementation and design, and enterprise systems. Prior to joining BerryDunn in 2006, Chad worked for an ERP system vendor, where he provided in-depth demonstrations on ERP, revenue, and public safety applications to prospective government clients in addition to providing project management and implementation support. He also served as a police officer in Maine for 10 years.



**Qualifications and Experience**

- ✓ **IT Assessments and Strategic Planning:** Chad has led IT assessment and strategic planning efforts for many of BerryDunn’s local government clients, including the cities of Bloomington, Minnesota; Louisville, Colorado; Santee, California; and Cambridge, Massachusetts; as well as Loudoun County, Virginia. As a result, he is skilled in eliciting valuable feedback and information from stakeholders; identifying gaps in IT assets, process, staffing, or governance; and aligning them with actionable initiatives that support the organization’s goals.
- ✓ **Project Management:** Chad has extensive experience in managing the planning, selection, and implementation of a variety of ERP systems for more than 30 clients across the country, as well as a number of business process improvement, IT strategic planning, and organizational analysis projects. His expertise informs and guides his team’s project management, issue/risk management, change management, and communication management methodologies.
- ✓ **Enterprise Systems Planning:** Chad is experienced in the full life cycle of planning for and procuring new enterprise systems, having assisted cities, counties, and school districts across the country with their software replacement initiatives. He has managed every step of the process, from

**Education**

- ❖ BA, Criminology, University of Southern Maine
- ❖ AS, Law Enforcement Technology, Southern Maine Technical College

**Certifications**

- ❖ Project Management Professional (PMP), Project Management Institute
- ❖ Certified Fraud Examiner (CFE), Association of Certified Fraud Examiners

**Professional Affiliations**

- ❖ Associate Member, Government Finance Officers Association (GFOA)
- ❖ Associate Member, International City/County Managers Association (ICMA)

assessing the current environment to conducting needs assessments, defining functional and technical requirements, developing an RFP and scoring methodology, assisting with evaluation of proposals, and leading contract negotiations. He is knowledgeable about the functionality and limitations of various ERP systems available in the market, as well as best practices in ERP business processes, and brings this insight to every engagement.

- ✓ **System Implementation Assistance:** Chad has led numerous BerryDunn system implementation projects in which we provided project management or project oversight services, including the monitoring of open issues, tracking of project milestones, review of vendor deliverables, oversight of User Acceptance Testing (UAT) and training, performance of go-live readiness assessments, and other quality assurance activities

### Prior Organizational Experience

**ERP Software Vendor:** Chad worked for a vendor of government ERP, revenue, and public safety applications for six years. In this role, he provided in-depth demonstrations to more than 40 municipal, county, and state agencies, as well as conducted gap-fit analyses and developed business process recommendations to meet the needs of his ERP implementation clients.

**Police Officer:** Chad was a police officer for a city in Maine for 10 years, focusing in accident reconstruction, field training, and investigations, as well as serving as a school resource officer.

### Chad's Key Clients

The following list is a representative sample of BerryDunn clients Chad has assisted with IT and management consulting engagements.

- City of Boca Raton, Florida
- City of Bloomington, Minnesota
- City of Boulder, Colorado
- City of College Station, Texas
- City of Glendale, Arizona
- City of Philadelphia, Pennsylvania
- City of Santa Fe, New Mexico
- City of Ormond Beach, Florida
- City of Coral Springs, Florida
- City of Homestead, Florida
- City of Sioux Falls, South Dakota
- Loudoun County, Virginia
- Washtenaw County, Michigan

**Representative Resume for  
Area 4: Project Management**

**SETH HEDSTROM ♦ SENIOR MANAGER ♦ PMP**

Seth focuses on assisting public sector clients with technology planning, organizational needs assessments, system planning and procurement, and the implementation of enterprise-wide information systems.



**Qualifications and Experience**

- ✓ **Project Management:** Seth has managed system selection and IT strategic planning projects for some of BerryDunn’s largest local government clients. For instance, he managed the utility billing system implementation for the City of Surprise, Arizona.
- ✓ **Enterprise System Selection:** Seth has in-depth experience in guiding public sector clients through every step of the system selection process, from conducting needs assessments to defining system requirements, crafting RFIs, facilitating vendor demonstrations, and leading contract negotiations.
- ✓ **Business Process Improvement:** Seth has provided business process improvement services for many BerryDunn clients, either as a stand-alone engagement or as part of an enterprise system selection. His experience includes documenting as-is business processes, benchmarking processes with similar organizations, introducing industry best practices, and developing to-be business process recommendations.

**Education**

- ❖ BS, Business Management, Babson College

**Certifications**

- ❖ Project Management Professional (PMP), Project Management Institute
- ❖ Six Sigma Green Belt Certified

**Professional Affiliations**

- ❖ Associate Member, Government Finance Officers Association (GFOA)

**Seth’s Key Clients**

The following list is a representative sample of BerryDunn clients Seth has assisted with IT and management consulting engagements.

- |                                  |                                     |
|----------------------------------|-------------------------------------|
| ▪ Arlington County, Virginia     | ▪ City of Midland, Texas            |
| ▪ City of Bismarck, North Dakota | ▪ City of Novato, California        |
| ▪ City of Bloomington, Minnesota | ▪ City of Santa Fe, New Mexico      |
| ▪ City of College Station, Texas | ▪ City of Sioux Falls, South Dakota |

- 
- City of Fort Collins, Colorado
  - City of Glendale, Arizona
  - City of Mesquite, Texas
  - City of South Jordan, Utah
  - City of Surprise, Arizona



## Representative Resume for Area 4: Project Management

### FRED TURNIER ♦ SENIOR CONSULTANT ♦ AICP ♦ MPA

Fred has more than 20 years of experience working with local government agencies and extensive experience assisting public sector entities with project management and development services, business process improvement, fee and cost recovery analysis, system design and implementation, and policy analysis and formation. He focuses in the areas of community development, planning, building, inspections, code enforcement, business licensing, housing and homeless issues, land management, utilities, and infrastructure planning.



#### Qualifications and Experience

- ✓ **Community Development:** Fred's extensive background in local government community development leadership positions affords him knowledge of technology, best practices, and common challenges in the field. He has served as community development or planning director for multiple cities, including Reno and Fernley, Nevada. His background includes technical and management oversight of planning, building, code enforcement, business licensing, code enforcement, inspections, housing programs, and homeless services.
- ✓ **Management of Innovative Programs:** In his various public sector roles, Fred has helped to develop a model for training small businesses in working with local Nevada jurisdictions; worked with solar and geothermal clients on site selection and transmission through federal and private lands; participated in the development of policies regarding air quality, water quality, and urban runoff; and consistently expanded the scope and depth of strategic planning in each organization he has been a part of. He is well-versed in leading forward-thinking—and, in some cases, controversial—initiatives.

#### Prior Organizational Experience

**City of Reno, Nevada:** During his tenure as community development director and planning manager, Fred oversaw the preparation of an annual budget of \$17 million, conducted a

#### Education

- ❖ Master's in Public Administration (MPA), University of Nevada, Las Vegas
- ❖ BA, Economics and Geography, University of Nevada, Reno

#### Certifications

- ❖ Certified Planner, American Institute of Certified Planners (AICP)

#### Professional Affiliations

- ❖ Member, American Planning Association

#### Conferences/Events

- ❖ MIT Center for Advanced Urbanism, Future of Suburbia, 2015, expert panel participant
- ❖ Washoe County Community Needs Health Assessment and Conference, 2015,

citywide development fee and cost-recovery analysis, and worked with the existing land management tracking vendor to expand capabilities for internal building plan reviews and inspections. He expanded the use of mobile data collection for ensuring Housing and Urban Development (HUD) compliance and assisted in creating a public training program for local small businesses interested in working with the City, which later became a model for statewide change. He updated the City's development code to be more user-friendly and incorporated Transit Oriented Development corridors and Mixed Use development centers into the City's Master Plan.

**City of Fernley, Nevada:** In his role as city manager and community development director, Fred was responsible for the development and presentation of a budget of more than \$15 million. In his role, Fred also worked closely with elected officials and community boards on a wide variety of initiatives, including the City's first strategic planning process, and successfully acquired more than \$20 million in American Recovery and Reinvestment Act (ARRA) stimulus monies for energy audits, redevelopment, and flood victim assistance.

**Sierra Land Solutions/Nevada Planning:** As a member and owner, Fred specialized in project management, land and infrastructure planning and costs estimates, entitlement processing, right-of-way acquisition, environmental permitting, negotiating entitlement conditions, and owner representation/public hearing presentations. His clients spanned California, Nevada, Idaho, and Arizona.

member and conference speaker

- ❖ IBM Smarter Cities, 2014, participant
- ❖ Mayors Institute on City Design – West, 2013, participant

### Fred's Key Clients

The following list is a representative sample of BerryDunn clients Fred has assisted with IT and management consulting engagements.

- Berks County, Pennsylvania
- City of Santa Fe, New Mexico
- City of Tucson, Arizona
- City of Boca Raton, Florida
- City of Philadelphia, Pennsylvania

## Representative Resume for Area 4: Project Management

### KEVIN PRICE ♦ MANAGER ♦ MPP, PMP

Kevin Price is a manager in BerryDunn’s Government Consulting Group. He leads our Community Development and Utility Operations Practice, assisting local government clients with business process improvement and system selection projects.



### Qualifications and Experience

- ✓ **System Selection:** Kevin has assisted BerryDunn clients with every stage of system replacement and implementation projects, from needs assessment to requirements definition, RFP development, proposal evaluation, facilitation of vendor demonstrations, contract negotiation, and implementation project management. He is currently assisting the City of Philadelphia with an assessment of the permitting and code violation systems within the Streets Department. He is also assisting the City of Tucson, Arizona, with the replacement of their existing permitting system.
- ✓ **Community Development Technology:** Kevin has assisted BerryDunn clients with Community Development system replacement projects, business process analysis and improvement, and various technology assessments. He is currently assisting Outagamie County, Wisconsin, with the implementation of their replacement community development system.
- ✓ **Project Management:** Kevin has managed system selection and IT strategic planning projects for some of BerryDunn’s most complex local government clients. He previously managed BerryDunn’s Municipal Street Addressing Project for the City of Philadelphia.

### Prior Organizational Experience

**Maine Department of Transportation:** Kevin worked in the Bureau of Systems Planning. He assisted with project planning—specifically, stakeholder meeting facilitation and the application of cost sharing policies. Kevin also conducted a

### Education

- ❖ Master’s in Public Policy and Management (MPP), Concentration in Financial Management, University of Southern Maine
- ❖ BA, Economics and Political Science, University of Maine

### Certifications

- ❖ Project Management Professional (PMP), Project Management Institute
- ❖ Lean Six Sigma Green Belt Certified
- ❖ Prosci®-Certified Change Management Practitioner

### Professional Affiliations

- ❖ Associate Member, Urban and Regional Information Systems Association (URISA)
- ❖ Associate Member, American Planning Association (APA)

national best practices report and an analysis of the risks and opportunities associated with public/private partnerships.

**U.S. Senate Committee on Small Business:** Kevin assisted in the material preparation for a variety of committee activities. He also prepared vote recommendations for amendments to pending legislation, and researched and identified issue area experts to testify at committee hearings.

### Kevin's Key Clients

The following list is a representative sample of BerryDunn clients Kevin has assisted with IT and management consulting engagements.

- City of Boca Raton, Florida
- City of Homestead, Florida
- Berks County, Pennsylvania
- City of Alexandria, Virginia
- City of Fredericksburg, Virginia
- City of Manassas, Virginia
- City of Bloomington, Minnesota
- City of College Station, Texas
- City of Dover, Delaware
- City of Farmers Branch, Texas
- City of Philadelphia, Pennsylvania
- City of Wilmington, North Carolina
- City of Mesquite, Texas
- City of Pearland, Texas
- City of Santa Fe, New Mexico
- City of South Jordan, Utah
- City of Tucson, Arizona
- Lake County, Illinois
- Outagamie County, Wisconsin
- Scott County, Iowa

## Representative Resume for Area 4: Project Management

### JONATHAN GRACE ♦ MANAGER

Jonathan Grace is a manager who has more than 17 years of experience assisting public sector agencies with project management, technology planning, business process improvement, system implementation and design, and Enterprise Resource Planning (ERP) systems. Prior to joining BerryDunn, he provided user support and assisted in system implementation of both Tier 1 and Tier 2 ERP products.

#### Qualifications and Experience

- ✓ **Project Management:** Jon has extensive experience in managing, planning, and implementing ERP systems. This perspective and insight benefits our ERP consulting clients across the country. He has led many business process improvement activities, strategic planning sessions, and assisted with organizational change management, which is a critical success factor for any large-scale implementation project.
- ✓ **Enterprise Systems Planning:** Jon is an expert in the full life cycle of planning for and procuring a new ERP system, having assisted cities, counties, and school districts across the country with their ERP replacements initiatives. He has managed every step of the process—from assessing the current environment to conducting a needs assessment, defining functional and technical requirements, developing an RFP and scoring methodology, assisting with evaluation of proposals, and leading contract negotiations. He is knowledgeable about the functionality and limitations of various ERP systems available in the market, as well as best practices in ERP business processes, and brings this insight to every engagement.

#### Prior Organizational Experience

**Tyler Technologies, MUNIS Division:** Jon began his career with Tyler in the Support Department as a technician on the Financials Management Application Team. In this role, he



#### Education

- ❖ BS, Business Administration, Elon College

#### Certifications

- ❖ Prosci®-Certified Change Management Practitioner

responded to customer calls and analyzed client issues, provided solutions, and trained clients migrating to the latest version of the product. From this role, he went on to become an associate sales representative and later a sales representative, demonstrating and assisting in the implementation of Financials Management applications.

**Harris Computer Systems.** Jon was the director of business development of the iONE Financial Management Information System within the company's inHANCE Division. In this role, he had creative control of the product's marketing materials and initiated the use of sales best practices for the sales team. Jon also provided pre-sales product demonstrations of the iONE Financial System, a product based on the Microsoft Dynamics GP 2010 software. Jon also provided training to internal staff. Prior to this role, Jon was the regional sales manager for Harris Computer System's Cayenta Division. In this role, he provided product demonstrations throughout his designated territory. Jon also worked with existing clients as a part time internal account manager and served as the internal Cayenta project manager for those Canadian clients migrating to Cayenta Financials from the NorthStar Financial Management System.

### Jon's Key Clients

The following list is a representative sample of BerryDunn clients Jon has assisted with IT and management consulting engagements.

- Albemarle County and Schools, Virginia
- Arlington Public Schools, Virginia
- Cherry Creek School District, Colorado
- City of Allen, Texas
- City of College Station, Texas
- City of Pearland, Texas
- City of Waynesboro and Schools, Virginia
- City of West Jordan, Utah
- Falls Church City Public Schools, Virginia
- New Kent County and Schools, Virginia
- Scott County, Minnesota
- Spokane Public Schools, Washington
- Washtenaw County, Michigan

## Representative Resume for Area 4: Project Management

### PAM COLEMAN ♦ SENIOR CONSULTANT ♦ CPP

With more than 15 years of experience in the municipal software industry, ranging from customer service and training to project management of implementations, Pam has a deep understanding of how municipal and public school clients leverage technology to meet their finance, budget, payroll, and HR needs.

#### Qualifications and Experience

- ✓ **ERP System Implementation:** During Pam's eight-year tenure with the Munis division of Tyler Technologies, she primarily assisted mid- to large-sized city and school district clients in the implementation of Munis products for finance, budget, payroll, and HR functions. As an implementation consultant, she routinely supervised configuration, testing, training, and go-live activities.
- ✓ **Software User Training:** As training manager for Data Technologies, Inc., Pam was responsible for maintaining user training tools and plans, including installation plans. In addition, she performed annual training presentations on the Munis product suite at Tyler Technologies' National User Group Conference, for as many as 200 participants.

#### Prior Organizational Experience

**Tyler Technologies:** As an implementation consultant, Pam provided analysis, training, and project management services for implementations of the Munis software product. She worked primarily with mid- to large-sized cities and public school districts, focusing on HR and payroll functions.

**Data Technologies, Inc.:** As a customer service representative, Pam performed the setup, installation, training, and technical support of Summit Accounting Software for city governments using cash-basis fund accounting. The software modules she worked with included Accounts Payable, Bank Reconciliation, General Ledger, Payroll, Utility Billing, Purchase Orders, Inventory Control, Fixed Assets, Cemetery, Receipt



#### Certifications

- ❖ Certified Payroll Professional (CPP)



Management, and Project Accounting. Later, following a promotion to training manager, Pam was responsible for the ongoing training and evaluation of new and existing employees related to their knowledge of in-house software.

**Advanced Metal Corp./Crigler Enterprises, Inc.:** As a controller and office manager, Pam was responsible for all accounting functions and the management of office staff for two corporations, housed in a single office. She had oversight of Payables, Receivables and Collections, Inventory, Commissions, Payroll, General Ledger and Financial Statements, Employee Benefits, Business Insurance, Asset Management, Fleet Management, and Office Management.

**ITI Division of Teleco, Inc.:** Pam oversaw day-to-day operations of a manufacturing division of Teleco, and was responsible for Accounts Payable, Tracking and Approving, Accounts Receivable and Collections, Inventory Control and Purchasing, Order Entry, System Maintenance, General Ledger, and Office Administration functions.

### Pam's Key Clients

The following list is a representative sample of BerryDunn clients Pam has assisted with IT and management consulting engagements.

- City of Boulder, Colorado
- City of Chaska, Minnesota
- City of College Station, Texas
- City of Gahanna, Ohio
- City of Ormond Beach, Florida
- Round Rock Independent School District, Texas
- Scott County, Minnesota



**Representative Resume for  
Area 4: Project Management**

**SUSAN JOHNSON ♦ SENIOR CONSULTANT ♦ MBA, PMP**

Susan is an IT management professional with over 25 years of experience spanning strategic technology planning, enterprise system implementation, and the development and deployment of software and web applications for both private companies and public institutions, including municipalities. She has demonstrated her thought leadership with speaking engagements, publications and educational workshops, and by serving on the Board of Directors and as president of the Urban and Regional Information Systems Association (URISA).



**Qualifications and Experience**

- ✓ **K-12 School Technology:** Susan’s experience as Chief Information Officer for the 18th largest school district in the nation, Charlotte Mecklenburg Schools, affords her valuable insight in to the challenges and priorities of K-12 school districts and their enterprise IT governance. She has applied her skill set to projects with the Blue Valley Unified School District in Kansas and Weston Public Schools in Massachusetts.
- ✓ **Strategic Technology Planning:** Susan’s 25+ years of providing IT leadership for public and private sector organizations gives her deep experience in planning and executing a wide variety of IT initiatives, from staffing and organization changes to the implementation of infrastructure upgrades, enterprise-wide software systems, and GIS programs. She previously applied this knowledge as the BerryDunn project manager for an ERP system implementation for the City of College Station, Texas.

**Prior Organizational Experience**

**Family Dollar Stores, Inc.:** Susan served as an internal change management consultant to the vice president of Solutions Delivery. Her responsibilities included the technology strategic plan and project delivery for a number of business functions, including Transportation, Warehousing, Replenishment, and Global Sourcing.

**Education**

- ❖ MBA, Wake Forest University
- ❖ BA, Business Administration, Economics, North Carolina State University

**Certifications**

- ❖ Project Management Professional (PMP), Project Management Institute
- ❖ Certificate in Municipal Administration, University of North Carolina

**Professional Affiliations**

- ❖ Former Board Member and President, Urban and Regional Information Systems Association (URISA)

**Charlotte Mecklenburg Schools:** During her tenure at CMS, a school district of 135,000 students and 19,000 staff, Susan led the implementation of business intelligence portals for students and teachers, a new ERP system, employee self-service portals, and a major infrastructure upgrade.

**City of Charlotte, North Carolina:** As key business executive, Susan was responsible for four major divisions delivering 16 services, including enterprise IT, regional radio and wireless data communications, fleet management, competition and privatization program management, procurement of goods and services, and cable franchise management for both the City and Mecklenburg County. Her achievements at the City of Charlotte included launching a City-County 311 General Government Call Center on VOIP technology and installing an SCT Banner Utility Billing system for City water, County water, and wastewater utilities.

**City of Raleigh, North Carolina:** As information services director, Susan integrated five disparate divisions into an effective Information Services Department, delivering application development, computer operations, geographic information services, transcription, print shop, cable franchise management and consulting, and cable access broadcasting to the City of Raleigh. She led the replacement of a multi-jurisdictional, public safety computer-aided dispatch; financial system; utility billing system; and public records imaging software. In addition, she led a cross-functional team in the creation of a \$3.2 million Geographic Information System initiative that included enterprise-wide applications with a strong data and application sharing relationship with the City.

### Susan's Key Clients

The following list is a representative sample of BerryDunn clients Susan has assisted with IT and management consulting engagements.

- City of Coral Springs, Florida
- City of Boca Raton, Florida
- City of Fredericksburg, Virginia
- City of Manassas, Virginia
- City of Dover, Delaware
- City of College Station, Texas
- City of Farmers Branch, Texas
- City of Independence, Missouri
- City of Waynesboro, Virginia
- City of Wilmington, North Carolina
- Goochland County, Virginia
- Loudoun County, Virginia
- City of Richland, Washington
- Montgomery County Public Schools, Maryland
- Outagamie County, Wisconsin

## Representative Resume for Area 4: Project Management

### SUSAN GARD-SMITH ♦ SENIOR CONSULTANT

Susan's more than 35 years of experience spans government contracting, software training, help desk management, application management and implementation, and enterprise project management. She has supervised cross-functional teams, including technical staff, business executives, elected officials, and subject matter experts.

#### Qualifications and Experience

- ✓ **Improving Service Outcomes:** As a help desk supervisor for CTA, Inc., Susan directly managed a staff of 30 help desk technicians. She was responsible for recruiting, scheduling, and overseeing professional development of all technicians. During her tenure, she reduced the backlog of daily open tickets by 80%, improved service quality measures, and supported the capture of renewal business.
- ✓ **Project and Program Management:** Susan is experienced in the successful project management of multiple, global, and concurrent projects, including the use of project tracking and testing tools to consistently meet deadlines, work within budget, and meet project objectives. She has led numerous third-party projects, including payment processing, document imaging, data conversion, software development, and quality assurance testing of server applications.

#### Prior Organizational Experience

**City of Suffolk, Virginia:** As an independent contractor, Susan was responsible for managing the City's Revenue System replacement project. Upon selection of a third-party vendor, the City engaged Susan to assist in developing and executing an implementation plan, including change management activities.

**Ferguson Enterprises/Wolseley:** Susan held a number of positions with Ferguson Enterprises/Wolseley, including program manager for a nationwide Ethernet network conversion, senior project leader for the software development



#### Education

- ❖ BA, Management, National-Louis University

#### Professional Affiliations

- ❖ Member, Association of Change Management Professionals (ACMP)
- ❖ Member, Project Management Institute (PMI) Mid Atlantic Local Chapter – Hampton Roads, VA

#### Certifications

- ❖ Prosci®-Certified Change Management Practitioner

life cycle (SDLC), and senior project manager for the implementation of SAP software.

**IBM Global Services:** Susan served in the role of project manager and was responsible for managing the Business Maintenance Platform Project for the AT&T ADM Account. She identified, managed, and escalated risks and issues as appropriate; supervised project teams; and provided IT management and leadership to guide applications analysis, development, testing and deployment, and change management initiatives.

### Susan's Key Clients

The following list is a representative sample of BerryDunn clients Susan has assisted with IT and management consulting engagements.

- Berks County, Pennsylvania
- City of Coral Springs, Florida
- City of Dover, Delaware
- City of Fredericksburg, Virginia
- City of Independence, Missouri
- City of Ormond Beach, Florida
- City of Waynesboro, Virginia
- Goochland County, Virginia
- Henrico County, Virginia
- Montgomery County Public Schools, Maryland
- Round Rock Independent School District, Texas
- Sussex County, Pennsylvania
- Three Rivers Park District, Minnesota

## 3.0 Qualifications of Firm

### 3.1 Firm Overview

BerryDunn is a national consulting and certified public accounting firm with experience in all 50 states and Canada. Our Government Consulting Group is dedicated to independently serving state, municipal, and quasi-governmental agencies, with a full complement of consulting services.

Our Government Consulting Group has worked with more than 300 state and local government agencies across the country—including, among others, health and human services, justice and public safety, administration and finance, education, and community development. We assist our clients in the following areas:

- Managing large system modernization projects
- Strengthening and reengineering business processes
- Planning for, procuring, and managing the implementation of complex new systems
- Evaluating and providing guidance related to enterprise architecture, system design, master data management, and data governance
- Identifying and planning for integration and data sharing needs with other systems
- Evaluating and strengthening system security

Within our Government Consulting Group, BerryDunn has separate consulting practice areas dedicated to serving colleges and universities, local government agencies, and state agencies. Each practice area is led by a BerryDunn principal and includes one or more project managers and a team of consultants to serve customer needs. Our principals, project managers, and consulting team members are actively involved in relevant industry conferences and events related to organizations.

BerryDunn's Government Consulting Group will be responsible for providing the services offered to The City in our service catalog. The team is comprised of approximately 120 consultants. Figure A below presents the organizational structure of our Government Consulting Group, as well as the positioning of the five practice areas within that structure.

#### About BerryDunn



Limited Liability Company founded in **1974**



Headquartered in **Maine**, with additional office locations in Arizona, Connecticut, Massachusetts, New Hampshire, and West Virginia

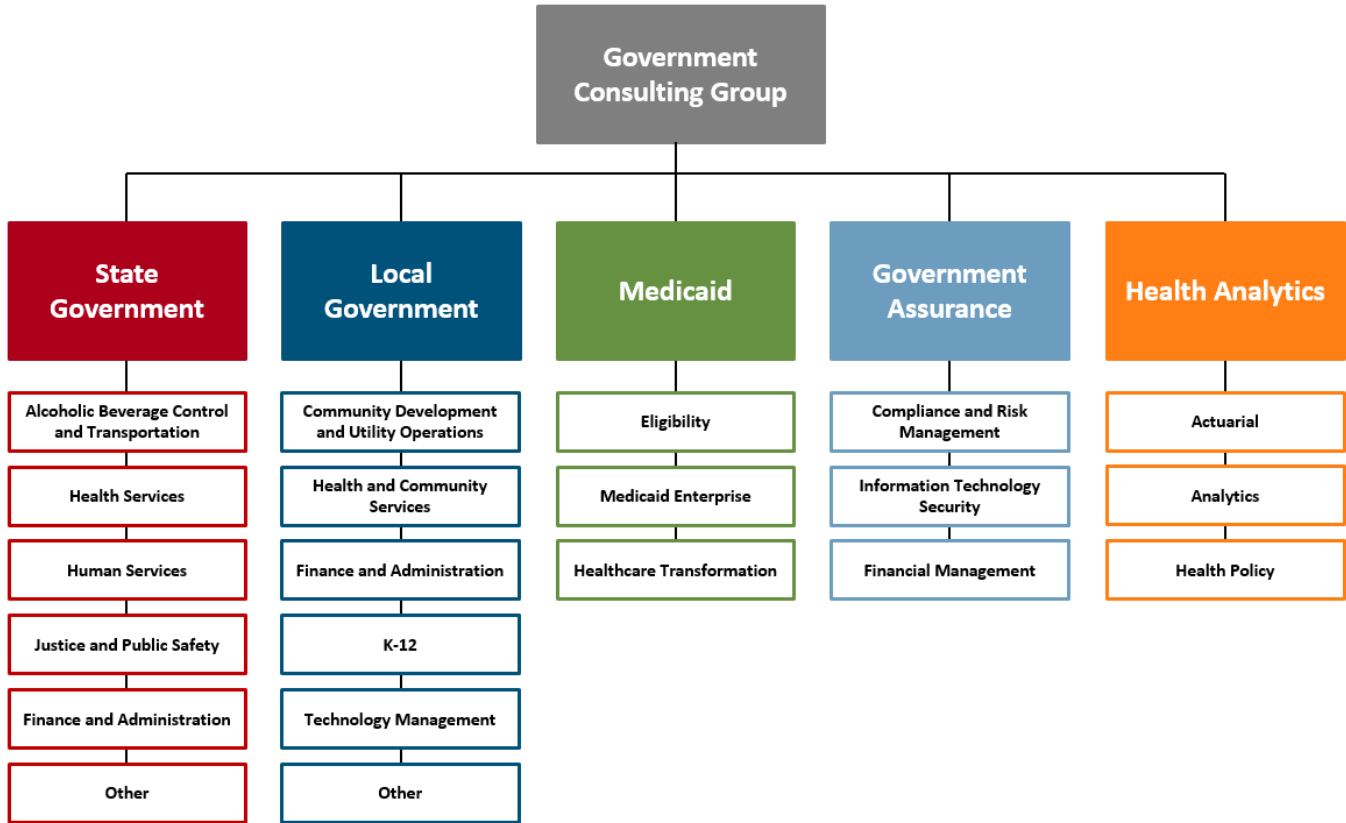


Over **330** employees, with steady growth over the past **43** years



Government Consulting Group with more than **120** consultants engaged in similar contracts

**Figure A: Government Consulting Group Structure**



The following points highlight BerryDunn’s qualifications as they relate to the services sought by the City:

- Deep Bench of Experienced Consultants.** BerryDunn employs approximately 120 full-time consultants in our Government Consulting Group—including 30 certified Project Management Professionals (PMPs), 16 certified Prosci® Certified Change Practitioners, 15 certified Six Sigma Green Belts, 12 consultants foundation-certified by ITIL in IT Service Management, 7 Certified Associates in Project Management (CAPMs), and 5 Certified Information System Security Professionals (CISSPs). These certifications are backed by years of hands-on experience in project management, business analysis, systems security, process improvement, change management, and system implementation.
- Independence and Objectivity.** To provide truly objective consulting services to public sector clients, BerryDunn does not sell or develop hardware or software. In addition, we maintain independence from hardware and software vendors and system integrators.

We take the quality of our work seriously and aim to exceed our clients’ expectations of the quality and timeliness of our communications, service delivery, and final work products. We strive to assure quality by understanding client expectations, developing a reasonable and

achievable project approach, gaining client concurrence on project tasks and timing, and using appropriate staff for each engagement.

BerryDunn's Government Consulting Group conducts projects ranging from short-term \$10,000 projects to multi-year, multi-million dollar engagements. Our customers include both smaller organizations and larger entities.

All BerryDunn projects are managed by the assigned project principal, who has overall responsibility for our contractual relationship with the customer, oversees the quality of services provided, and works in collaboration with the designated BerryDunn project manager to ensure that customer needs are being met and exceeded.

**97% of BerryDunn clients reported satisfaction with their most recent experience, citing that our collaborative approach, expertise, knowledge, and innovative ideas improved their organization's performance.**

### **Our Commitment to the State of Florida**

The City will benefit from BerryDunn's demonstrated commitment to serving public sector clients in the State. We have developed a strong understanding of the public sector landscape in the State through recent or ongoing IT consulting engagements with the following clients:

- ❖ City of Boca Raton, FL
- ❖ City of Coral Springs, FL
- ❖ City of Homestead, FL
- ❖ City of Ormond Beach, FL
- ❖ City of Port Orange, FL

In addition, BerryDunn has received an intention to award letter from the City of Gainesville pursuant to Request for Procurement #CMGR-180039-MS – IT Consultant Services. This recommendation is currently scheduled to be presented to the City Commission for their approval on March 1, 2018.

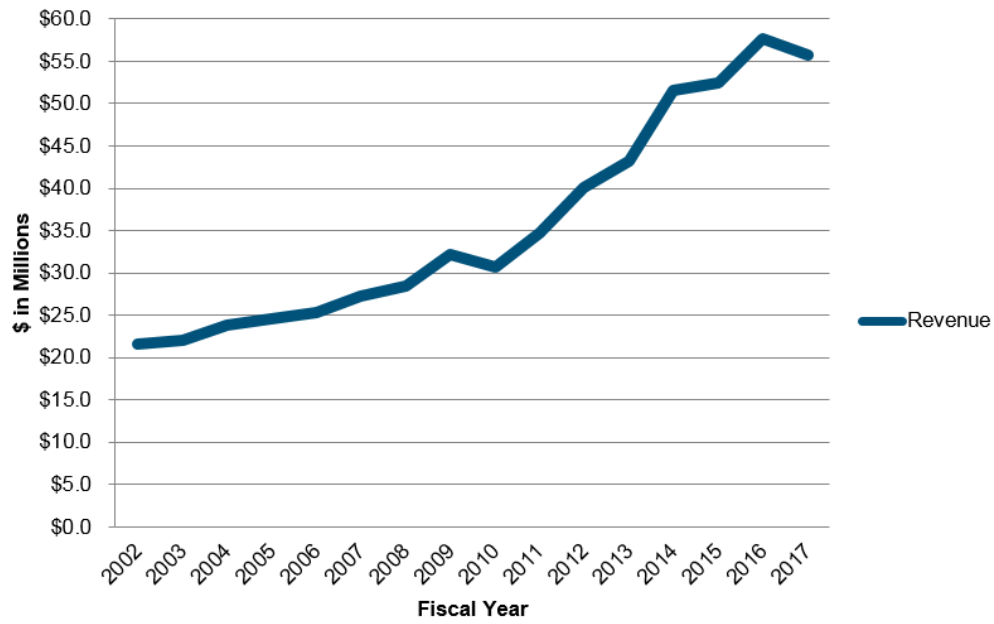
### **Financial Stability (Confidential)**

As a privately held Certified Public Accounting and Consulting firm, BerryDunn is not required to prepare audited or un-audited financial statements. However, the financial information and exhibits provided in this section exemplify the strong financial condition of our firm. BerryDunn has sustained steady growth during our 43-year history.

Should additional information be required regarding BerryDunn's financial stability, we would be pleased to provide additional information at the request of the City. Additionally, for more information on BerryDunn's financial stability, you may contact William Schad, Vice President, Commercial Lending at TD Bank in Portland, Maine, at (207) 761-8612 or by email at [william.schad@tdbanknorth.com](mailto:william.schad@tdbanknorth.com).

Figure B (below) presents BerryDunn's revenue for the previous 15 fiscal years. Figure C (on the following page) provides BerryDunn's Condensed Financial Information for the previous three fiscal years. To further demonstrate our financial stability, we have provided a letter from BerryDunn's primary financial institution demonstrating our good standing.



**Figure B****BerryDunn Yearly Revenue (in millions)**



**Figure C**
**Berry Dunn McNeil & Parker  
Condensed Financial Information  
For the Years Ended June 30**

	<u>FY15</u>	<u>FY16</u>	<u>FY17</u>
Current Assets	\$ 15,677,588	\$ 16,018,242	\$ 14,063,140
Fixed Assets, Net	1,473,153	2,232,806	2,255,209
	<u>\$ 17,150,741</u>	<u>\$ 18,251,048</u>	<u>\$ 16,318,349</u>
Current Liabilities	4,343,472	4,397,332	5,675,684
Amounts due Principals & Principals' Equity	12,807,268	13,853,716	10,642,665
	<u>\$ 17,150,740</u>	<u>\$ 18,251,048</u>	<u>\$ 16,318,349</u>
Operating Revenue	52,403,929	57,664,659	55,801,216
Operating Expenses	(42,236,224)	(46,425,993)	(49,092,487)
Depreciation & Amortization	(410,515)	(591,088)	680,860
Interest Expense	18,906	6,040	(10,694)
Net Income	<u>\$ 9,776,096</u>	<u>\$ 10,653,618</u>	<u>\$ 7,378,895</u>

Operating expenses include all amounts paid out to Principals as compensation, accordingly there is no net income reflected.

The above information is confidential and proprietary to Berry Dunn McNeil & Parker, LLC. Any inquiries on it or requests for additional information should be direct to John M. Chandler, Managing Partner at (207) 775-2387 ext. 2211.



**TD Bank**  
**America's Most Convenient Bank®**  
One Portland Square  
P. O. Box 9540  
Portland, ME 04112-9540  
T 207 761 8600  
F 207 761 8660

[tdbank.com](http://tdbank.com)

July 13, 2016

RE: Berry, Dunn, McNeil & Parker, Inc.  
100 Middle Street  
Portland, Maine 04101

To Whom It May Concern:

Berry, Dunn, McNeil & Parker, Inc. has been a valued customer of TD Bank, N.A. since 1991, always maintaining a satisfactory loan and deposit relationship with the Bank. Over the past twenty four (24) years they have consistently demonstrated the financial capacity and credit worthiness to successfully provide accounting, tax, and business consulting services throughout the Northern New England area.

Berry Dunn is a well-regarded customer of the Bank and they have handled their affairs with the utmost integrity.

Please feel free to call me should you have any questions

Sincerely,



William R. Schad  
Regional Vice President

## 3.2 Our Experience

### Area 3 – Technology (Information, Data Collection, Citizen Engagement, etc.)

Table 1 provides a representative list of government clients for which we have provided technology consulting services similar to those the City is seeking.

**Table 1: Relevant BerryDunn Client Engagements**

Client	Estimated Population	Project Description
Westchester County, New York	956,000	Strategic Technology Planning
Mobile County, Alabama	415,000	IT Strategic Plan for Health Department
Dakota County, Minnesota	410,000	IT Strategic Plan for Community Services Division
Loudoun County, Virginia	375,000	Technology Staffing Analysis and restructuring
Somerset County, New Jersey	334,000	IT Strategic Plan for Parks Commission
Springfield Water and Sewer Commission, Massachusetts	250,000	IT Department Evaluation
Saginaw County, Michigan	193,000	Mainframe Applications Assessment and Replacement Study
City of Jackson, Mississippi	176,000	Strategic Technology Planning
Carroll County, Maryland	168,000	Strategic Technology Planning
Scott County, Iowa	167,000	IT Assessment and IT Strategic Planning
Kent County, Delaware	165,000	Strategic Technology Planning
City of Cambridge, Massachusetts	107,000	IT Staffing Assessment and Realignment
City of Bloomington, Minnesota	86,000	Strategic Technology Planning
Glynn County, Georgia	80,000	IT Department Opportunities and Risk Assessment
City of Loveland, Colorado	68,000	Strategic Technology Planning
Town of Greenwich, Connecticut	61,000	Strategic Technology Planning
City of Alpharetta, Georgia	59,000	Strategic Technology Planning
City of Port Orange, Florida	57,000	Strategic Technology Planning
City of Santee, California	53,000	Strategic IT Master Plan
City of South Jordan, Utah	51,000	Strategic Technology Planning
City of Harrisonburg, Virginia	50,000	Strategic Technology Planning

<b>Client</b>	<b>Estimated Population</b>	<b>Project Description</b>
City of Concord, New Hampshire	43,000	IT and Business Master Plan
City of Winchester, Virginia	27,000	Strategic Technology Planning
Town of Farragut, Tennessee	22,000	IT Strategic Plan
City of Louisville, Colorado	19,000	Strategic Technology Planning
City of La Vista, Nebraska	16,000	Strategic Technology Planning
Town of Wayland, Massachusetts	13,000	Strategic Technology Planning
Town of Weston and Public Schools, Massachusetts	11,000	IT Assessment
Arlington Public Schools, Virginia	25,000 students	Information Services Review
Spokane Public Schools, Washington	29,000 students	IT Assessment
Blue Valley Public School District, Kansas	22,000 students	IT Assessment
Falls Church Public Schools, Virginia	166,000	Network Assessment
New Hampshire Department of Administrative Services	1,321,000	Statewide Strategic Technology Planning
New Hampshire Department of Resources and Economic Development	1,321,000	Statewide Strategic Telecommunications Planning

In addition, BerryDunn has extensive experience in providing a variety of systems consulting services to clients similar in size and complexity to the City. In Table 2, we have included a summary of public sector systems consulting projects our firm has assisted with. We have also provided population data and the clients' legacy systems in order to offer additional context regarding our experience.

**Table 2: BerryDunn's Public Sector System Selection Consulting Clients**

<b>Client (Population)</b>	<b>System Type (Legacy System)</b>	<b>Needs Assessment/ Gap Analysis</b>	<b>Requirements Gathering</b>	<b>RFP Development</b>	<b>Evaluation Criteria Development</b>	<b>Software Selection Assistance</b>	<b>Contract Negotiation Assistance</b>	<b>Implementation Assistance</b>
Berks County, Pennsylvania (415,000)	CAMA and Tax Collection (Tyler CLT and In-House Applications)	✓	✓	✓	✓	✓	✓	
City of Alexandria, Virginia (150,000)	Land Management and Permitting ( <i>Accela Tidemark Advantage</i> )	✓	✓	✓	✓	✓	✓	
City of Allen, Texas (85,000)	ERP ( <i>SunGard HTE</i> )							✓
City of Bismarck, North Dakota (67,000)	Community Development ( <i>non-integrated systems</i> )	✓	✓	✓	✓	✓	✓	✓
City of Bloomington, Minnesota (86,000)	ERP ( <i>SunGard HTE</i> )	✓	✓	✓	✓	✓	✓	✓
City of Bloomington, Minnesota (86,000)	Community Development ( <i>non-integrated systems</i> )	✓	✓	✓	✓	✓	✓	✓
City of Boca Raton, Florida (91,000)	ERP ( <i>SunGard HTE and Infor Infinium</i> ), Community Development ( <i>SunGard HTE</i> ), Utility Billing ( <i>SunGard HTE</i> )	✓	✓	✓	✓	✓	✓	
City of Boulder, Colorado (105,000)	ERP ( <i>non-integrated customized systems</i> )							✓

Client (Population)	System Type (Legacy System)	Needs Assessment/ Gap Analysis	Requirements Gathering	RFP Development	Evaluation Criteria Development	Software Selection Assistance	Contract Negotiation Assistance	Implementation Assistance
City of Chaska, Minnesota (26,000)	Time and Attendance	✓					✓	✓
City of College Station, Texas (95,000)	ERP (SunGard HTE)	✓	✓	✓	✓	✓	✓	✓
City of Coral Springs, Florida (128,000)	ERP (SunGard HTE)	✓	✓	✓	✓	✓	✓	
City of Dover, Delaware (37,453)	ERP (SunGard HTE)	✓	✓	✓	✓	✓	✓	✓
City of Farmers Branch, Texas (35,000)	ERP, Community Development, and Utility Billing (SunGard HTE)	✓	✓	✓	✓	✓	✓	✓
City of Fredericksburg, Virginia (27,000)	ERP and CAMA (BAI and Stonewall)	✓	✓	✓	✓	✓	✓	✓
City of Gahanna, Ohio (35,000)	ERP (SunGard eFinancePlus)	✓	✓	✓	✓	✓	✓	
City of Glendale, Arizona (237,000)	ERP (PeopleSoft)	✓	✓	✓	✓	✓	✓	✓
City of Grants Pass, Oregon (35,000)	Utility Billing (SunGard HTE)							✓
City of Homestead, Florida (65,000)	Community Development (SunGard HTE)	✓	✓	✓	✓	✓	✓	✓
City of Independence, Missouri (117,000)	ERP (Oracle J.D Edwards World)	✓	✓	✓	✓	✓	✓	✓
City of Irving, Texas (230,000)	ERP (Banner), Utility Billing (Harris inHANCE)	✓	✓	✓	✓	✓	✓	✓
City of La Vista, Nebraska (13,000)	ERP and Community Development (Summit Data-Tech)	✓	✓	✓	✓	✓	✓	
City of Manassas, Virginia (37,000)	ERP (SunGard HTE and Daffron CIS)	✓	✓	✓	✓	✓	✓	✓

Client (Population)	System Type (Legacy System)	Needs Assessment/ Gap Analysis	Requirements Gathering	RFP Development	Evaluation Criteria Development	Software Selection Assistance	Contract Negotiation Assistance	Implementation Assistance
City of Medicine Hat, Alberta (61,000)	ERP (Oracle J.D. Edwards)	✓	✓	✓	✓	✓	✓	✓
City of Mesquite, Texas (134,000)	ERP (Performance)	✓	✓	✓	✓	✓	✓	✓
City of Midland, Texas (119,000)	ERP (CGI) and CAD-RMS (Tiburon and Spillman Technologies)	✓	✓	✓	✓	✓	✓	
City of Novato, California (52,000)	ERP (SunGard HTE)	✓	✓	✓	✓	✓	✓	
City of Ormond Beach, Florida (42,000)	ERP (SunGard HTE)							✓
City of Pearland, Texas (96,000)	ERP (SunGard HTE)	✓	✓	✓	✓	✓	✓	✓
City of Prior Lake, Minnesota (23,000)	ERP (UST Financials)	✓	✓	✓	✓	✓	✓	✓
City of Rapid City, South Dakota (72,000)	ERP (SunGard Bitech)			✓	✓		✓	✓
City of Richland, Washington (53,000)	ERP (Harris GEMS), Community Development (Harris BluePrince), Utility Billing (Harris Advanced Utilities)	✓	✓	✓	✓	✓	✓	✓
City of Santa Fe, New Mexico (70,000)	ERP (Oracle J.D. Edwards EnterpriseOne and SunGard HTE)	✓	✓	✓	✓	✓	✓	✓
City of Shoreline, Washington (55,000)	ERP (SunGard IFAS), Utility Billing (Springbrook)		✓	✓	✓	✓	✓	✓

Client (Population)	System Type (Legacy System)	Needs Assessment/ Gap Analysis	Requirements Gathering	RFP Development	Evaluation Criteria Development	Software Selection Assistance	Contract Negotiation Assistance	Implementation Assistance
City of Sioux Falls, South Dakota (158,000)	ERP (SunGard HTE)	✓	✓	✓	✓	✓	✓	✓
City of South Jordan, Utah (59,000)	ERP (MS Great Plains)		✓	✓	✓	✓	✓	✓
City of Surprise, Arizona (121,000)	ERP (Mitchell Humphries FMS and Vista PDS)	✓	✓	✓	✓	✓	✓	✓
City of Tucson, Arizona (525,000)	Community Development (Accela Permits Plus)	✓	✓	✓	✓	✓	✓	
City of Waynesboro, Virginia (21,000)	ERP (SunGard HTE)	✓	✓	✓	✓	✓	✓	
City of West Jordan, Utah (108,000)	ERP (SunGard Pentamation)		✓	✓	✓	✓	✓	
City of Wilmington, North Carolina (117,000)	ERP; Community Development; Asset Management (SunGard HTE)	✓	✓	✓	✓	✓	✓	✓
Coconino County, Arizona (140,000)	ERP (SunGard HTE)						✓	✓
Gallatin County, Montana (100,000)	Financial (Tyler Technologies' Eden)	✓	✓	✓	✓	✓		
Henrico County, Virginia (325,000)	EHR (Cerner – Anasazi)	✓	✓	✓	✓	✓		
Hillsborough County, Florida (1,234,000)	Human Resources and Payroll (non-integrated customized systems)		✓	✓	✓	✓	✓	
Kent County, Delaware (170,000)	Financial (New World), Land Management (SunGard HTE), CAMA (Microsolve)	✓						



Client (Population)	System Type (Legacy System)	Needs Assessment/ Gap Analysis	Requirements Gathering	RFP Development	Evaluation Criteria Development	Software Selection Assistance	Contract Negotiation Assistance	Implementation Assistance
Lake County, Illinois (700,000)	Community Development ( <i>Infor Hansen</i> )	✓	✓	✓	✓	✓	✓	
Minnehaha County, South Dakota (183,000)	ERP ( <i>non-integrated systems</i> )	✓	✓	✓	✓	✓	✓	✓
Mobile County, Alabama (415,000)	EHR ( <i>Greenway</i> )	✓	✓	✓	✓	✓	✓	
Montgomery County Public Schools, Maryland (1,040,000)	ERP ( <i>Oracle and Lawson</i> )	✓						
New Kent County, Virginia (18,000)	ERP ( <i>Bright and Associates (BAI)</i> )	✓	✓	✓	✓	✓	✓	
Outagamie County, Wisconsin (184,000)	Community Development ( <i>Non-integrated customized systems</i> ) and CAD-RMS ( <i>TriTech and Motorola Premier One CAD</i> )	✓	✓	✓	✓	✓	✓	✓
Pitkin County, Colorado (18,000)	ERP <i>Tyler Technologies Eden</i>	✓	✓	✓	✓	✓	✓	
Scott County, Iowa (166,000)	ERP ( <i>Platinum</i> )	✓	✓	✓	✓	✓	✓	✓
Scott County, Minnesota (143,000)	ERP ( <i>Infor</i> )	✓						
South Carolina Department of Health and Environmental Control	Client Automated Record and Encounter System (CARES)	✓	✓	✓	✓	✓		
Sussex County, Delaware (200,000)	ERP ( <i>Oracle J.D. Edwards</i> )	✓	✓	✓	✓	✓	✓	
Town of Greenwich, Connecticut (62,000)	Human Capital Management System ( <i>Tyler Technologies' MUNIS</i> )	✓	✓	✓	✓	✓	✓	✓

Client (Population)	System Type (Legacy System)	Needs Assessment/ Gap Analysis	Requirements Gathering	RFP Development	Evaluation Criteria Development	Software Selection Assistance	Contract Negotiation Assistance	Implementation Assistance
Town of Herndon, Virginia (22,000)	ERP (SunGard HTE)	✓	✓	✓	✓	✓	✓	
Washington County, Minnesota (252,000)	Human Resources and Payroll (Infor Infinium)	✓	✓	✓	✓	✓	✓	✓
Washtenaw County, Michigan (350,000)	ERP (Oracle J.D. Edwards)	✓	✓	✓	✓	✓	✓	✓

### Area 4 – Project Management

BerryDunn has extensive experience providing Project Management and Project Oversight services for enterprise-wide system implementation projects. In Table 3, we have summarized some of the project management services we have provided within the past five years.

**Table 3: Project Management/Oversight Clients**

Client	Project Details	System Implemented
<b>Washtenaw County, Michigan</b> Population: 345,000	BerryDunn is providing project management services for Washtenaw County as a continuation of our work with the County to select a replacement ERP system.	Munis ERP
<b>Washington County, Minnesota</b> Population: 250,000	BerryDunn is providing project oversight services for Washington County as a continuation of our work with the County to select a replacement HR and Payroll system.	Highline
<b>City of Glendale, Arizona</b> Population: 235,000	BerryDunn is providing project management services for the City of Glendale as a continuation of our work with the City to select a replacement ERP system.	Munis ERP
<b>Minnehaha County, South Dakota</b> Population: 185,000	BerryDunn is providing project management services for Minnehaha County as a continuation of our work with the County to select replacement ERP and Tax systems.	Munis and Incode Tax
<b>Outagamie County, Wisconsin</b> Population: 182,000	BerryDunn is providing project oversight services for Outagamie County as a continuation of our work with the County to select a replacement community development system. BerryDunn is also providing project management services for the County as it replaces its CAD-RMS system.	CityView Community Development and Spillman Technologies CAD-RMS
<b>Scott County, Iowa</b> Population: 167,000	BerryDunn provided project oversight for Scott County's implementation of an ERP system.	New World Systems ERP
<b>City of Sioux Falls, South Dakota</b> Population: 157,000	BerryDunn provided project oversight assistance as the City of Sioux Falls implemented an ERP system. BerryDunn is currently providing project oversight services for the City as a continuation to our work with the City as it replaces its CAD-RMS system.	Munis ERP; EnerGov Community Development; and Zuercher Technologies CAD-RMS
<b>City of Mesquite, Texas</b> Population: 143,000	BerryDunn provided project management services for the City of Mesquite, as part of a City-wide financial system implementation.	Munis ERP, Incode Courts, and Tyler Utility Billing

Client	Project Details	System Implemented
<b>City of Surprise, Arizona</b> Population: 126,000	BerryDunn is providing project management services for the City of Surprise as a continuation of our work with the City to select a replacement ERP system.	Munis ERP and EnerGov Community Development
<b>City of Boulder, Colorado</b> Population: 103,000	BerryDunn provided project management services for the City of Boulder for its ERP system implementation.	Munis ERP
<b>City of Pearland, Texas</b> Population: 96,000	BerryDunn is providing project oversight services for the City of Pearland as a continuation of our work with the City to select a replacement ERP system.	New World Systems
<b>City of College Station, Texas</b> Population: 95,000	BerryDunn is providing project management services for the City of College Station as a continuation of our work with the City to select a replacement ERP system.	Munis ERP and TRAKiT Community Development
<b>City of Allen, Texas</b> Population: 94,000	BerryDunn is providing project oversight assistance as the City of Allen implemented an ERP system.	Munis ERP and EnerGov Community Development
<b>City of Bloomington, Minnesota</b> Population: 86,000	BerryDunn provided project oversight services for the City of Bloomington, as a continuation of our work with the City to select a replacement ERP system.	Munis ERP
<b>City of Santa Fe, New Mexico</b> Population: 70,000	BerryDunn is providing project management services for the City of Santa Fe as a continuation of our work with the City to select a replacement ERP system.	Munis ERP, EnerGov, and Kronos Telestaff and Workforce Central
<b>City of Rapid City, South Dakota</b> Population: 70,000	BerryDunn provided project oversight assistance to the City of Rapid City as it implemented an ERP system (Financials and HR/Payroll).	Munis ERP
<b>City of Bismarck, North Dakota</b> Population: 65,000	BerryDunn provided Independent Verification and Validation (IV&V) to the City of Bismarck during the implementation of its replacement land records management system.	CRW Community Development
<b>City of South Jordan, Utah</b> Population: 62,000	BerryDunn provided project oversight assistance as the City of South Jordan implemented an ERP system.	Munis ERP and CityView Community Development
<b>Town of Greenwich, Connecticut</b> Population: 61,000	BerryDunn provided project oversight services for the Town of Greenwich as a continuation	ADP HRIS

Client	Project Details	System Implemented
	of our work with the Town to select a replacement HR and payroll system.	
<b>City of Medicine Hat, Alberta</b> Population: 61,000	BerryDunn provided project oversight services for the City of Medicine Hat as a continuation of our work with the City to select a replacement ERP system.	Unit4 ERP
<b>City of Ormond Beach, Florida</b> Population: 42,000	BerryDunn is providing project management services for the City of Ormond Beach for its ERP implementation.	Munis ERP
<b>City of Manassas, Virginia</b> Population: 42,000	BerryDunn is providing project oversight services for the City of Manassas as a continuation of our work with the City to select a replacement ERP system.	Munis ERP and EnerGov Community Development
<b>City of Grants Pass, Oregon</b> Population: 35,000	BerryDunn provided project management services for the City of Grants Pass for its ERP system implementation.	Munis Utility Billing
<b>City of Chaska, Minnesota</b> Population: 26,000	BerryDunn is providing project management oversight services to the City of Chaska for its time, attendance, and scheduling system implementation.	ExecuTime
<b>City of Prior Lake, Minnesota</b> Population: 24,000	BerryDunn provided project management oversight services to the City of Prior Lake as a continuation of our work with the City to select a replacement ERP system.	BS&A ERP
<b>City of Waynesboro, Virginia</b> Population: 21,000	BerryDunn is providing project oversight services for the City of Waynesboro as a continuation of our work with the City to select a replacement ERP system.	Munis ERP and EnerGov Community Development
<b>Three Rivers Park District, Minnesota</b> 11,000 Visitors Annually	BerryDunn is providing project management services for the District's financial system implementation as a continuation of our work with the District to select a replacement financial system.	BS&A

### 3.3 References

In order to demonstrate BerryDunn’s relevant experience and the quality of our past work, we have provided references for three previous projects of similar scope and size to the efforts the City may undertake. In Table 4, we have included contact information for three client representatives who can speak to our expertise, proven methodology, and effective project communications.

**Table 4: Prior Client References**

<b>Organization</b>	<b>Description of Services</b>	<b>Contact Information</b>
<b>City of Bloomington, Minnesota</b>	<i>Strategic Technology Planning</i>	<b>Ms. Amy Cheney</b> Information Services Manager Telephone: (952) 563-4877 Email: <a href="mailto:acheney@ci.bloomington.mn.us">acheney@ci.bloomington.mn.us</a>
<b>City of Boca Raton, Florida</b>	<i>Enterprise Resource Planning (ERP) System Assessment, and Selection</i>	<b>Ms. Sandra Stevens</b> IT Director Telephone: (561) 393-7724 Email: <a href="mailto:sstevens@ci.boca-raton.fl.us">sstevens@ci.boca-raton.fl.us</a>
<b>City of College Station, Texas</b>	<i>Enterprise Resource Planning (ERP) System Assessment, Selection, and Implementation Project Management</i>	<b>Ms. Erin Provazek</b> Assistant IT Director Telephone: (979) 764-3482 Email: <a href="mailto:eprovazek@cstx.gov">eprovazek@cstx.gov</a>

## Attachment A – HOURLY RATES

Complete the rate chart below for services offered. If a company is proposing more than one service, please complete a rate chart for each service offered.

### AREA 1 – ORGANIZATIONAL DESIGN

Respondent's Name: \_\_\_\_\_

Job Title	Principal	Senior Consultant	Consultant	Junior Consultant	Program & Administrative Support
Hourly Rate	\$_____	\$_____	\$_____	\$_____	\$_____

### AREA 2 – HUMAN RESOURCE POLICY

Respondent's Name: \_\_\_\_\_

Job Title	Principal	Senior Consultant	Consultant	Junior Consultant	Program & Administrative Support
Hourly Rate	\$_____	\$_____	\$_____	\$_____	\$_____

### AREA 3 – TECHNOLOGY (INFORMATION, DATA COLLECTION, CITIZEN ENGAGEMENT, ETC.)

Respondent's Name: \_\_\_\_\_

Job Title	Principal	Senior Consultant	Consultant	Junior Consultant	Program & Administrative Support
Hourly Rate	\$_____	\$_____	\$_____	\$_____	\$_____



## AREA 4 – PROJECT MANAGEMENT

Respondent's Name: \_\_\_\_\_

Job Title	Principal	Senior Consultant	Consultant	Junior Consultant	Program & Administrative Support
Hourly Rate	\$_____	\$_____	\$_____	\$_____	\$_____

## AREA 5 – LEADERSHIP

Respondent's Name: \_\_\_\_\_

Job Title	Principal	Senior Consultant	Consultant	Junior Consultant	Program & Administrative Support
Hourly Rate	\$_____	\$_____	\$_____	\$_____	\$_____

## AREA 6 – EXECUTIVE COACHING

Respondent's Name: \_\_\_\_\_

Job Title	Principal	Senior Consultant	Consultant	Junior Consultant	Program & Administrative Support
Hourly Rate	\$_____	\$_____	\$_____	\$_____	\$_____

**PROPOSAL RESPONSE FORM – SIGNATURE PAGE**  
(submit this form with your proposal)

TO: City of Gainesville, Florida  
200 East University Avenue  
Gainesville, Florida 32601

PROJECT: Management Consulting (Non-Construction)

RFQ#: CMGR-180051-GD

RFQ DUE DATE: February 8, 2018, 3:00pm Local Time

Proposer's Legal Name: Berry Dunn McNeil & Parker, LLC

Proposer's Alias/DBA: BerryDunn

Proposer's Address: 100 Middle Street  
Portland, ME 04101

**PROPOSER'S REPRESENTATIVE (to be contacted for additional information on this proposal)**

Name: Charles Snow Telephone Number (207) 541-2294

Date: February 8, 2018 Fax Number (207) 775-2375

Email address csnow@berrydunn.com

**ADDENDA**

The Proposer hereby acknowledges receipt of Addenda No.'s 1, \_\_\_\_\_, \_\_\_\_\_, to these Specifications.

**TAXES**

The Proposer agrees that any applicable Federal, State and Local sales and use taxes, which are to be paid by City of Gainesville, are included in the stated bid prices. Since often the City of Gainesville is exempt from taxes for equipment, materials and services, it is the responsibility of the Contractor to determine whether sales taxes are applicable. The Contractor is liable for any applicable taxes which are not included in the stated bid prices.

**LOCAL PREFERENCE (check one)**

Local Preference requested:  YES  NO

A copy of your Business tax receipt and Zoning Compliance Permit should be submitted with your bid if a local preference is requested.

**QUALIFIED LOCAL SMALL AND/OR DISABLED VETERAN BUSINESS STATUS (check one)**

Is your business qualified as a Local Small Business in accordance with the City of Gainesville Small Business Procurement Program? (Refer to Definitions)  YES  NO

Is your business qualified as a Local Service-Disabled Veteran Business in accordance with the City of Gainesville Small and Service-Disabled Veteran Business Procurement Program? (Refer to Definitions)  YES  NO

**LIVING WAGE COMPLIANCE**

See Living Wage Decision Tree (Exhibit C hereto)

**Check One:**

- Living Wage Ordinance does not apply (check all that apply)
  - Not a covered service
  - Contract does not exceed \$100,000
  - Not a for-profit individual, business entity, corporation, partnership, limited liability company, joint venture, or similar business, who or which employees 50 or more persons, but not including employees of any subsidiaries, affiliates or parent businesses.
  - Located within the City of Gainesville enterprise zone.
- Living Wage Ordinance applies and the completed Certification of Compliance with Living Wage is included with this bid.

NOTE: If Contractor has stated Living Wage Ordinance does not apply and it is later determined Living Wage Ordinance does apply, Contractor will be required to comply with the provision of the City of Gainesville's living wage requirements, as applicable, without any adjustment to the bid price.

**SIGNATURE ACKNOWLEDGES THAT: (check one)**

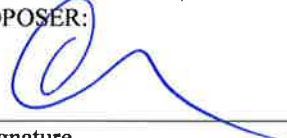
- Proposal is in full compliance with the Specifications.
- Proposal is in full compliance with specifications except as specifically stated and attached hereto.

Signature also acknowledges that Proposer has read the current City of Gainesville Debarment/Suspension/Termination Procedures and agrees that the provisions thereof shall apply to this RFP.

ATTEST:

  
 \_\_\_\_\_  
 Signature  
 By: Jennifer Anthony  
 \_\_\_\_\_  
 Title: Administrative Assistant  
 \_\_\_\_\_

(CORPORATE SEAL)

PROPOSER:  
  
 \_\_\_\_\_  
 Signature  
 By: Charles Snow, Pricpal  
 \_\_\_\_\_  
 Title: Principal  
 \_\_\_\_\_

---

We have the following exceptions to the City's General Provisions, set forth in Section III of the RFQ. We would appreciate the opportunity to discuss and negotiate these terms with the City, if selected for award.

- **Item B, Indemnification:** BerryDunn has a robust professional liability policy for acts or omissions of BerryDunn, our agents, employees, and subcontractors. This policy contains language within it that states that it will not apply if BerryDunn takes on additional liabilities under contract, such as the agreement to indemnify. In order to help ensure that our clients have the protection of this policy, we ask to remove indemnification language as it relates to negligence in professional services.

## DRUG FREE WORKPLACE FORM

The undersigned vendor in accordance with Florida Statute 287.087 hereby certifies that

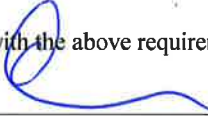
Berry Dunn McNeil & Parker, LLC (dba BerryDunn)

does:

(Name of Business)

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty of nolo contendere to, any violation of Chapter 893, Florida Statutes, or of any controlled substance law of the United State or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.

  
\_\_\_\_\_  
Bidder's Signature

Charles Snow, Principal      2/8/2018

\_\_\_\_\_  
Date

**CITY OF GAINESVILLE**

**CERTIFICATION OF COMPLIANCE WITH LIVING WAGE**

**The undersigned** hereby agrees to comply with the terms of the Living Wage Ordinance and to pay all covered employees, as defined by City of Gainesville Ordinance 020663 as amended at 030168 (Living Wage Ordinance), during the time they are directly involved in providing covered services under the contract with the City of Gainesville for Management Consulting a living wage of \$11.8269 per hour to covered employees who receive Health Benefits from the undersigned employer and \$13.08 per hour to covered employees not offered health care benefits by the undersigned employer.

Name of Service Contractor/Subcontractor: Berry Dunn McNeil & Parker, LLC

Address: 100 Middle Street, Portland, ME 04101

Phone Number: 800-432-7202

Name of Local Contact Person Charles Snow

Address: 100 Middle Street, Portland, ME 04101

Phone Number: (207) 541-2294

\$ NA  
(Amount of Contract)

Signature:  Date: 2/8/2018

Printed Name: Charles Snow

Title: Principal



## ADDENDUM NO. 1

Date: February 1, 2018

Bid Date: February 8, 2018  
at 3:00 P.M. (Local Time)

Bid Name: Management Consulting (Non-Construction)

Bid No.: CMGR-180051-GD

NOTE: This Addendum has been issued only to the holders of record of the specifications.

The original Specifications remain in full force and effect except as revised by the following changes which shall take precedence over anything to the contrary.

Please find attached:

- a) Copy of the black out period information (Financial Procedures Manual Section 41-423 Prohibition of lobbying in procurement matters) distributed during mandatory pre-bid meeting.

The following are answers/clarifications to questions received on or before 3:00pm January 25, 2018:

1. Question: As an RFQ, we plan to provide a representation of the subject matter experts in our stable. Are we required to utilize the staff we propose, and if not, what is the process for approval of additional staff once a project is defined?  
  
Answer: No; the City is open to varying resources based on the project needs at the time. Please share the resumes of your associates or those persons that will work on the project.
  
2. Question: What is the latest version of the strategic plan and is it available online? If so, what is the URL?  
  
Answer: Information pertaining to Gainesville's most recent strategic framework (i.e., strategic plan), including the three phase process that led to its development, is described at:  
<http://www.cityofgainesville.org/CityManager/StrategicPlanning/CityStrategicPlan.aspx>  
  
Additionally, a link the strategic framework one-pager can be found directly at:  
<http://www.cityofgainesville.org/Portals/0/openGNV/Framework%20One-Pager%20-%20for%20prezi.pdf>.  
  
Please note that this framework presents guiding questions for the city to continually align projects, processes and organizational resources. This is not intended to be a strategic plan in the typical "mission, vision, values, objectives" format.
  
3. Question: What is the general criteria for onsite work for the potential projects covered by this RFQ  
Answer: Please see number 4.



4. Question: Does City of Gainesville encourage and/or permit virtual work tools for meetings and presentations (e.g., WebEx or GoToMeeting)?

Answer: Yes

5. Question: When was the last time the City of Gainesville conducted a review and update of their Human Resource policies?

Answer: This effort has been continuous since 2003, including a comprehensive rewrite that began in 2009. We've found that policies in general are fragmented and in some instances, silent, unclear and/or confusing, inconsistent or outdated relative to changing workplace practices/regulations, market and employee needs.

6. Question: Are there any areas of particular concern regarding Human Resource policies?

Answer: Policies in general are fragmented and in some instances, silent, unclear/confusing, inconsistent or outdated relative to changing workplace practices/regulations, market and employee needs

7. Question: What is the current approval process and structure for policy governance (i.e., how are policies approved)?

Answer: Policies are developed, reviewed and approved, through the department who owns the policy, reviewed as to form and legality with the City Attorney's office, escalated to the City's Charter Officers for review and approval, and when necessary, final approvals are decided on by the elected body consisting of the City Commission and Mayor.

8. Question: Does the City currently outsource any of the IT operations?

Answer: Yes

9. Question: In reference to the statement that Gainesville is not a tourist destination, what primary sources of revenue for the City

Answer: The primary source of revenue for the city is the general fund which is generated through property values, etc.

10. Question: Are there examples to further describe the expectations of a "citizen-centered" City?

Answer: The most comprehensive resources that describe our citizen centered efforts include the following materials:

- a. The Blue Ribbon Report found at:  
<http://www.cityofgainesville.org/Portals/0/clerk/CityComm/BlueRibbonReport.pdf>
- b. A Fast Company Magazine article, available at:  
<https://www.fastcodesign.com/3065107/how-one-florida-city-is-reinventing-itself-with-ux-design>
- c. The city's citizen centered microsite, available at:  
[www.gainesvillecitizens.org](http://www.gainesvillecitizens.org)

11. Question: When was the last time you had a Management Consulting study?

Answer: Over the years, consultants have been brought in for certain departments if needed. We are not aware of an overarching management consultant study that has been conducted for the overall organization in recent years.

12. Question: Did a consultant perform this study? If so, who was the consultant and at what professional fee structure?

Answer: See response to question 11. Fees and fee structure have varied based on the services needed at that time.

13. Question: Is there a preference for using a firm that can complete all areas vs. a firm that is bidding on only a few areas of the project?

Answer: We are open to any proposal whether it includes all services or a few areas as outlined in the RFQ.

14. Question: Do you have a timeline needed for completion?

Answer: This is dependent on the project and would be defined by determining what resources are available, the prioritized need for the work and the timeline the City and consultant agree upon. In some cases it is possible to request that services be expedited

15. Question: Do you have a project budget range for this project or these project areas?

Answer: We are developing a budget range for the various projects. This will be dependent on the department's available funding and the project need

16. Question: Will a company's Acord Form, Certificate of Liability Insurance, provide the City with proof of required insurance?

Answer: Acord Form, COI is acceptable

17. Question: Areas 2, 5 & 6 seem to have common threads; will the City consider merging into one?

Answer: Yes, the City will consider merging various subject areas.

18. Question: What is the meaning of Area 5 - Leadership? Does this refer to cutting-edge / innovative citizen-centered strategies or, more literally, the city's leadership and office leadership?
- Answer: We are interested in proposals on either topic. There is a need for leadership development programs, particularly in the areas of management and executive coaching.
19. Question: Is the Leadership area during implementation?
- Answer: Yes. This bid is intended to encompass a series of projects depending on the City's needs at that point in time. The specific project and implementation timelines will be defined dependent on the department or organization's needs.
20. Question: Will consultant have the ability to identify new gaps and blend into an existing area?
- Answer: Yes. We welcome any feedback the consultant would provide and we would remain open to discussing suggested solutions.
21. Question: If consultant bids for one or less than all areas, how does the city plan to project manage multiple consultants? e.g. Governance structure?
- Answer: Consultants are going to be awarded to be in a pool of consultants that will be individually selected as needed by the City on a per project basis. Consultants will work with the department that has requested their assistance. This will be dependent on the department's available funding and the project need.
22. Question: How will the Smart City Lab with the University of Florida be intertwined into each area?
- Answer: The Lab will be staffed by personnel from both the City and University. The Lab will be the vehicle by which the City and University conduct joint research into smart city technologies and policies.
23. Question: Will ongoing City projects be folded into the consulting services by area or will only new tasks, jointly developed with the consultant and city be in scope?
- Answer: This could be current and existing projects or new projects as determined by the City's prioritized needs and funding availability. Please refer to the RFQ.
24. Question: Would consultant be excluded from any new projects coming out of this engagement, e.g. AV/EV strategy requirement?
- Answer: No

25. Question: What is the fee estimate?  
Answer: The fee estimate is under development at this time.
26. Question: What is the expected contract duration for each area?  
Answer: The expected contract duration will be determined at the time a department selects a vendor
27. Question: What is the procurement type?  
Answer: This is a Request for Qualifications
28. Question: Will PM role apply to all areas in the RFQ? Other projects to be determined at a later date, e.g. Smart City Lab with the University of Florida?  
Answer: I do not foresee us procuring PM services for projects in the Smart City Lab.
29. Question: If we have more than one respondent identified for an area should we blend the rate or just list separately?  
Answer: Blending is acceptable.
30. Question: Is there a page limit?  
Answer: No, however, responses should be kept as concise as possible.
31. Question: Our understanding is that the “Projected award date” refers to the timeframe in which respondents will be informed that they have been selected by the City to contract for Management Consulting Services. Can you provide additional timeline details for the “Projected award date” at this time?  
Answer: The projected award date is April, 2018.
32. Question: How much lead/response time does the City anticipate allotting to qualified contractors to respond to the specific project following selection of qualified contractors?  
Answer: The city is willing to determine lead time during the negotiations process.
33. Question: Of the six management areas outlined, which one does the following bullet point apply to – ‘Management or strategy consulting, including strategy implementation and execution’?  
Answer: The bullet point applies to consulting, implementation, and implementation as determined during contract negotiations.
34. Question: In Section K. the City states four (4) areas in which the City will be responsible to work with the selected consultant(s). Will the City also be able to make staff available for a

specific project (or projects) to serve in roles that might be typically supported by City staff – such as participating on a Steering Committee, or serving as a Subject Matter Resource (SMR) to assist with validating and/or reviewing the project approach and deliverables?

Answer: Yes

35. Question: Given that the RFQ process as described is intended to assist the City in selecting qualified firms or individuals - and that there would be a subsequent effort to negotiate a contract or contracts with firms or individuals that the City selects - in our response we would provide proposed project staff who represent the qualifications and related experience required for the scope of the corresponding requested services. Final determination of the actual staff to be assigned to a project or projects would be confirmed as part of contract negotiations, as the timeframe in which a negotiated contract would begin is not yet determined, and staff availability may change accordingly.

In turn, if proposed project staff is not fully available during the timeframe of a negotiated project, we would make the effort to include those staff as Subject Matter Resources (SMRs) wherever possible and appropriate. **Please confirm that this approach will meet the requirements of RFQ No. CMGR-180051-GD.**

Answer: Yes as long as project staff is listed in the RFQ

36. Question: “D3. Consultant’s firm shall provide a Dun & Bradstreet report to the city or some other acceptable means for the City to evaluate the firm’s financial stability and reliability.” Is this to be provided with the qualifications or after consultant selection?

Answer: Yes

37. Question: “D4. Consultant’s firm shall provide proof of insurance in a form acceptable to the City, which give the City 30 days’ written notice (except the City will accept ten (10) days’ written notice for non-payment) prior to cancellation or material change in coverage, in the amounts as noted below:” Is this to be provided with the qualifications or after consultant selection?

Answer: After consultant selection

38. Question: “D6. Consultant’s firm shall provide updated contact information for all clients served within the past three (3) years who were provided with the same management consulting services covered under the Statement of Qualifications being submitted.” We have conducted 190 projects within the last three years in the areas on which we are proposing. We will be happy to list the clients. For how many do you want contact information?

Answer: Please provide 3-5 reference of similar management consultant requirements.

39. Question: "A copy of the consultant's current Florida Professional Registration Certificate must be provided. If the consultant is a corporation, it must be chartered to conduct business in Florida." Is this to be provided with the qualification or after consultant selection?

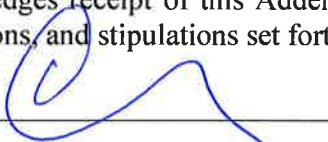
Answer: Yes with the qualification

ACKNOWLEDGMENT: Each Proposer shall acknowledge receipt of this Addendum No. 1 by his or her signature below, **and a copy of this Addendum to be returned with proposal.**

CERTIFICATION BY PROPOSER

The undersigned acknowledges receipt of this Addendum No. 1 and the Proposal submitted is in accordance with information, instructions, and stipulations set forth herein.

PROPOSER:

  
\_\_\_\_\_

BY:

Charles Snow, Principal

DATE:

February 8, 2018

# *State of Florida*

## *Department of State*

I certify from the records of this office that BERRY, DUNN, MCNEIL & PARKER LLC is a Maine limited liability company authorized to transact business in the State of Florida, qualified on July 10, 2003.

The document number of this limited liability company is M03000002254.

I further certify that said limited liability company has paid all fees due this office through December 31, 2013, that its most recent annual report was filed on March 26, 2013, and its status is active.

I further certify that said limited liability company has not filed a Certificate of Withdrawal.

*Given under my hand and the  
Great Seal of the State of Florida  
at Tallahassee, the Capital, this  
the Eighth day of May, 2013*



*Ken Detjmer*  
*Secretary of State*

Authentication ID: CU7632856954

To authenticate this certificate, visit the following site, enter this ID, and then follow the instructions displayed.

<https://efile.sunbiz.org/certauthver.html>

## Credit eValuator Plus Report

### Berry, Dunn, McNeil & Parker, LLC

100 Middle St Fl 4 E Tower  
Portland, ME 4101  
Phone: 207 541-2200  
D-U-N-S Number: 07-173-5229

Report as of : **January 6, 2015** \*\*



Need more in-depth information and analysis?

[Upgrade](#) to the Comprehensive Insight Plus Report and receive the credit for the amount of your evaluator purchase

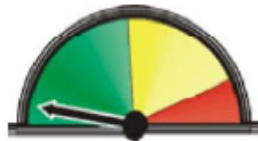
[>Learn more](#)

Credit Information

Payment Trend

\*\*Included with this Credit eValuator Report are continuous tracking of key business changes and free Alert messages in the View My Reports/Alerts page. You can also choose to receive e-mail notifications of the important changes. IMPORTANT NOTE: You will not receive e-mail alerts if you have opted out of receiving communications from D&B.

### Risk Summary



Lower Risk Higher Risk

#### Risk of Late Payment

Risk of late payment is based on the following prioritized factors in addition to other information in D&B's files:

- No factors available

Indications of slowness can be the result of disputes over merchandise, skipped invoices, etc.



Unchanged

#### Payment Performance Trend

The payment performance trend for this company is Unchanged. The most recent payment information in D&B's files is:

- Payments currently: 8 days beyond terms.
- Payments 3 months ago: 9 days beyond terms.
- Industry average: 3 days beyond terms.

\*Note: Payments to suppliers are averaged weighted by dollar amounts.



### Credit Limit Recommendation

Recommendation  
Date: **JAN 06 2015**

Risk category for this business: **LOW**

#### D&B's Recommendations:

Conservative  
Credit Limit: **\$80,000**

Aggressive  
Credit Limit: **\$200,000**



Risk is assessed using D&B's scoring methodology and is one factor used to create the recommended limits. See [Help](#) for details.

### Company Profile

<b>Chief Executive:</b>	John Chandler, Mng Mbr	<b>Line of business:</b>	Accounting, Auditing, And
<b>Type of business:</b>	Corporation		Bookkeeping
<b>Years in business:</b>	41		
<b>Employees total:</b>	240		

### Legal Filings and Other Important Information

<b>Bankruptcies:</b>	None
<b>Judgments:</b>	None
<b>Liens:</b>	None
<b>Suits:</b>	None
<b>Negative Payment Experiences:</b>	None
<b>Payments Placed for Collection:</b>	None

\*\*Included with this Payment Trend Report are continuous tracking of key business changes and free Alert messages in the View My Reports/Alerts page. You can also choose to receive e-mail notifications of the important changes. IMPORTANT NOTE: You will not receive e-mail alerts if you have opted out of receiving communications from D&B.

 **Summary**
**BERRY, DUNN, MCNEIL & PARKER, LLC****D-U-N-S Number:** 07-173-5229**100 Middle St Fl 4 E Tower****Primary Industry SIC:** 8721**Portland, ME 04101****Description:** Accounting/auditing/bookkeepingThis is a **headquarters** location.  
Branch(es) or division(s) exist.**PAYMENT ACTIVITY:****Total Payment Experiences in D&B's File:** 63**Payments Within Terms:** 91%  
(not dollar weighted)**Total Placed For Collection:** 0**Average Highest Credit:** \$3,691**Largest High Credit:** \$25,000**Highest Now Owing:** \$5,000**Highest Past Due:** \$250

Indications of slowness can be the result of dispute over merchandise, skipped invoices, etc. Accounts are sometimes placed for collection even though the existence or amount of the debt is disputed.

**PAYDEX Scores - This Business**

**3- and 12- Month**

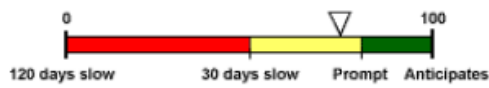
Shows the D&B PAYDEX scores as calculated on the most recent 3 months and 12 months of payment experiences.

The D&B PAYDEX is a unique, dollar weighted indicator of payment performance based on up to 63 payment experiences as reported to D&B by trade references. A detailed explanation of how to read and interpret PAYDEX scores can be found at the end of this report.

**Jump to:** [How to Read the PAYDEX Score](#)

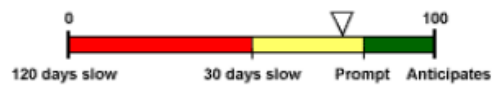
BERRY, DUNN, MCNEIL & PARKER, LLC DUNS 07-173-5229

**3-Month D&B PAYDEX: 76**  
When weighted by dollar amount, payments to suppliers average 6 days beyond terms.



Based on payments collected over last 3 months.

**12-Month D&B PAYDEX: 75**  
When weighted by dollar amount, payments to suppliers average 8 days beyond terms.



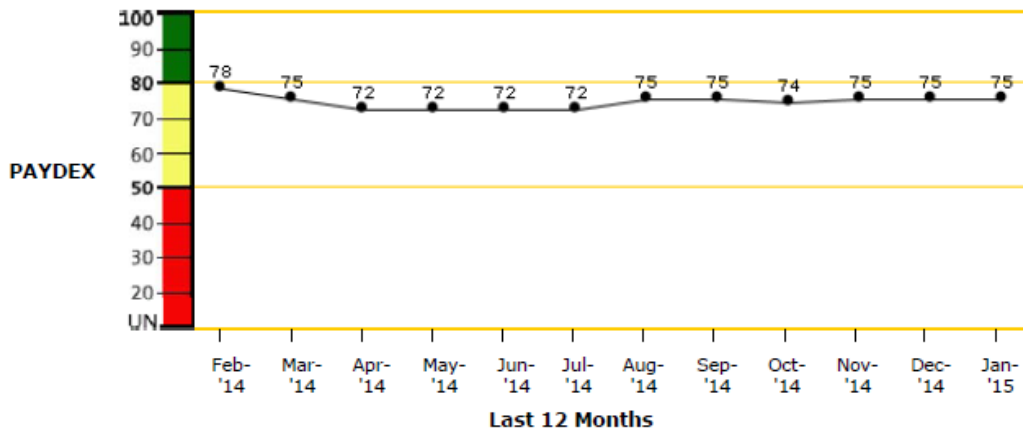
Based on payments collected over last 12 months.

**PAYDEX Yearly Trend - This Business**

**12 Months**

Shows the trend in D&B PAYDEX scoring over the past 12 months.

BERRY, DUNN, MCNEIL & PARKER, LLC DUNS 07-173-5229



Based on payments collected over the last 12 months.

- Current PAYDEX for this Business is 75, or equal to 8 days beyond terms
- The 12-month high is **78**, or equal to 3 days beyond terms
- The 12-month low is **72**, or equal to 12 days beyond terms



BERRDUN-03

Item #170915J

PSPENCER

# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

05/04/2017

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> Clark Insurance 2385 Congress Street Portland, ME 04104	<b>CONTACT NAME:</b> PHONE (A/C, No, Ext): (207) 774-6257 FAX (A/C, No): (207) 774-2994 E-MAIL ADDRESS: info@clarkinsurance.com	
<b>INSURER(S) AFFORDING COVERAGE</b>		<b>NAIC #</b>
INSURER A : Massachusetts Bay		22306
INSURER B : The Hanover Ins Company		22292
INSURER C : Maine Employers Mutual		11149
INSURER D : Underwriters at Lloyd's London		
INSURER E : Travelers Property Casualty Co. of America		25674
INSURER F :		

**INSURED**  
Berry Dunn McNeil & Parker LLC  
Jodi Coffee  
PO Box 1100  
Portland, ME 04104

**COVERAGES** **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS		
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR			ZDP D240054	04/30/2017	04/30/2018	EACH OCCURRENCE	\$ 1,000,000	
							DAMAGE TO RENTED PREMISES (Ea occurrence)	\$ 100,000	
A	<input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY			ADP D240058	04/30/2017	04/30/2018	COMBINED SINGLE LIMIT (Ea accident)	\$ 1,000,000	
							BODILY INJURY (Per person)	\$	
							BODILY INJURY (Per accident)	\$	
							PROPERTY DAMAGE (Per accident)	\$	
									\$
									\$
									\$
									\$
B	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> DED <input checked="" type="checkbox"/> RETENTION \$			UHP D240055	04/30/2017	04/30/2018	EACH OCCURRENCE	\$ 8,000,000	
							AGGREGATE	\$ 8,000,000	
									\$
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) Y/N If yes, describe under DESCRIPTION OF OPERATIONS below			5101800149	01/01/2017	01/01/2018	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER		
							E.L. EACH ACCIDENT	\$ 1,000,000	
							E.L. DISEASE - EA EMPLOYEE	\$ 1,000,000	
							E.L. DISEASE - POLICY LIMIT	\$ 1,000,000	
D	Cyber Liability			ESE03184409	04/30/2017	04/30/2018	Aggregate Limit	10,000,000	
E	Crime Coverage			105608076	04/30/2017	04/30/2018	Limit	5,000,000	

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

**CERTIFICATE HOLDER****CANCELLATION**

Berry Dunn McNeil &amp; Parker

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE



# CERTIFICATE OF LIABILITY INSURANCE

 DATE (MM/DD/YYYY)  
 04/01/2017

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

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<b>PRODUCER</b> Affinity Insurance Services 159 E. County Line Road Hatboro, PA 19040	<b>CONTACT NAME:</b> <b>PHONE (A/C, No, Ext):</b> _____ <b>FAX (A/C, No):</b> _____ <b>E-MAIL ADDRESS:</b> _____ <b>INSURER(S) AFFORDING COVERAGE</b> <b>INSURER A:</b> Continental Casualty Company <b>NAIC #</b> 20443 <b>INSURER B:</b> _____ <b>INSURER C:</b> _____ <b>INSURER D:</b> _____ <b>INSURER E:</b> _____ <b>INSURER F:</b> _____
<b>INSURED</b> Berry, Dunn, McNeil & Parker, LLC 100 Middle Street Portland, ME 04104	

**COVERAGES** **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	<b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER: _____						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED _____ RETENTION \$ _____						EACH OCCURRENCE \$ AGGREGATE \$ \$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N <input type="checkbox"/>	N/A				PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/> E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	Professional Liability			APL-188112791	04/01/2017	04/01/2018	\$1,000,000 per claim \$1,000,000 annual aggregate Limits shown are as requested.

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

**CERTIFICATE HOLDER**

 Berry Dunn McNeil & Parker, LLC  
 100 Middle Street  
 Portland, ME 04104

**CANCELLATION**

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE