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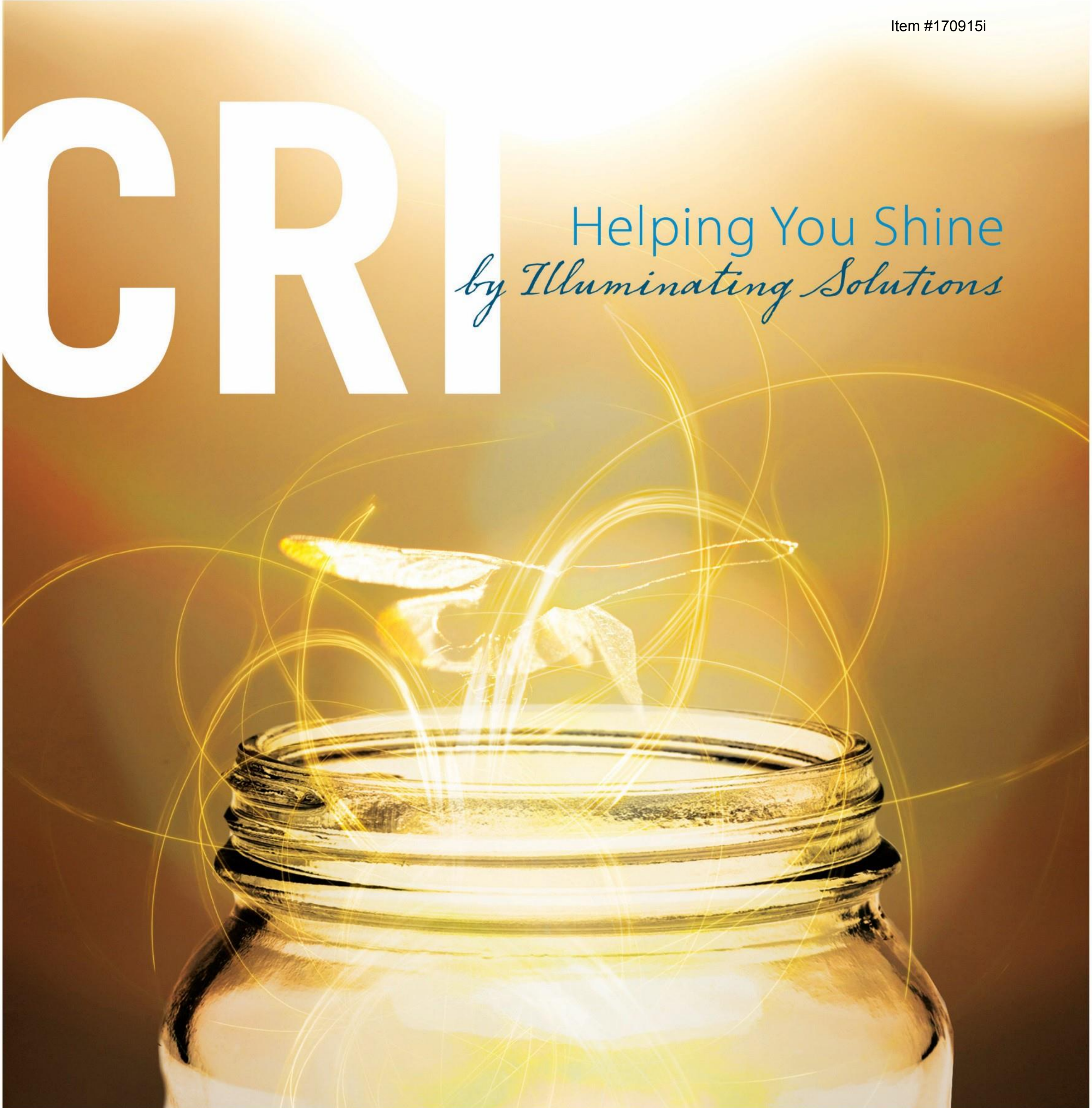

professional services

Statement of Qualifications for Management Consulting (Non-Construction) **RFQ CMGR-180051-GD**

February 8, 2018

PROPOSER

CRI Solutions Group, LLC
A division of Carr, Riggs, & Ingram
4010 NW 25th Place
Gainesville, FL 32606

CRI CARR RIGGS & INGRAM
CPAs and Advisors
CRIcpa.com

SUBMITTED BY

Dione Hasse, Partner
dhasse@CRIcpa.com

Exhibit F

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: CRI Solutions Group, LLC

Proposer's Alias/DBA: A Division of Carr, Riggs & Ingram

Proposer's Address: 4010 NW 25th Place
Gainesville, FL 32606

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

Name: Dione Hasse, Partner   Telephone Number 615-554-4489

Date: 2/8/2018   Fax Number n/a

Email address dhasse@Cricpa.com

ADDENDA

The Proposer hereby acknowledges receipt of Addenda No.'s ___________, __________, __________, 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

Exhibit F

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:	(CORPORATE SEAL) PROPOSER:
Signature: Julie S Noonan	Signature: Dione Hasse
By: Julie S. Noonan	By: Dione Hasse
Title: Sr. Consultant	Title: Partner

Dear Ms. Gayle Dykeman and the City of Gainesville:

Carr, Riggs & Ingram, LLC (CRI) appreciates the opportunity to submit this Statement of Qualifications in response to **RFQ CMGR-180051-GD, Multiple Management Consulting Services (Non-Construction)**. We are genuinely excited about the prospect of serving you and establishing a long-term relationship. We pride ourselves on getting to know our clients and illuminating solutions by providing innovative **IDEAS** to move them from compliance to providing them a competitive advantage.

I **nvestment in You.** We believe in developing long-term, mutually beneficial relationships and quickly demonstrating value with a fee structure and service solutions that provide immediate and continued savings. Our investment starts on "Day 1" as your assigned team begins with our proven, streamlined process that minimizes your time and disruption during our initial engagement within your organization.

D **edicated Team.** CRI's team consists of more than 1,800 professionals, which allows us to tailor your service team by aligning their industry, service, and specialty skills with your needs. Our dedicated teams deliver the highest level of business acumen and knowledge to your organization. Our commitment to consistent staffing allows you to maximize savings and remain focused on your needs.

E **quilibrium.** CRI delivers big firm expertise with small firm service. Of approximately 45,000 management advisory firms in the United States, CRI currently ranks among the top 20. We leverage resources from across our organization to develop solutions while maintaining local decision-making authority. This means that simplified solutions are only a phone call away; and we believe that's the best of both worlds for our clients.

A **ctive Partner Participation.** Collectively, our partners deliver expertise derived from more than 7,500 years of business experience. With this level of talent, we thoughtfully choose a partner that aligns with your business' needs and industry. Our hands-on, working partners "show up" to convey our genuine commitment to your success. They strive to earn trusted advisor roles by digging in, proactively learning your business, and producing long-term value for you.

S **implified Solutions.** We measure our success by working with you to translate complex business concepts and issues into solutions. Our services include advanced data analytics and data science, business resumption planning, customer impact and experience, industry-specific solutions, innovation and strategy planning, program and process leadership, all in addition to our strong change management and human capital consulting practice.

We welcome the opportunity to demonstrate to you the same teamwork, expertise, innovation, and responsiveness that have made us one of the fastest growing management advisory firms in the United States. Again, we appreciate your consideration.

Sincerely,

Dione Hasse, Partner

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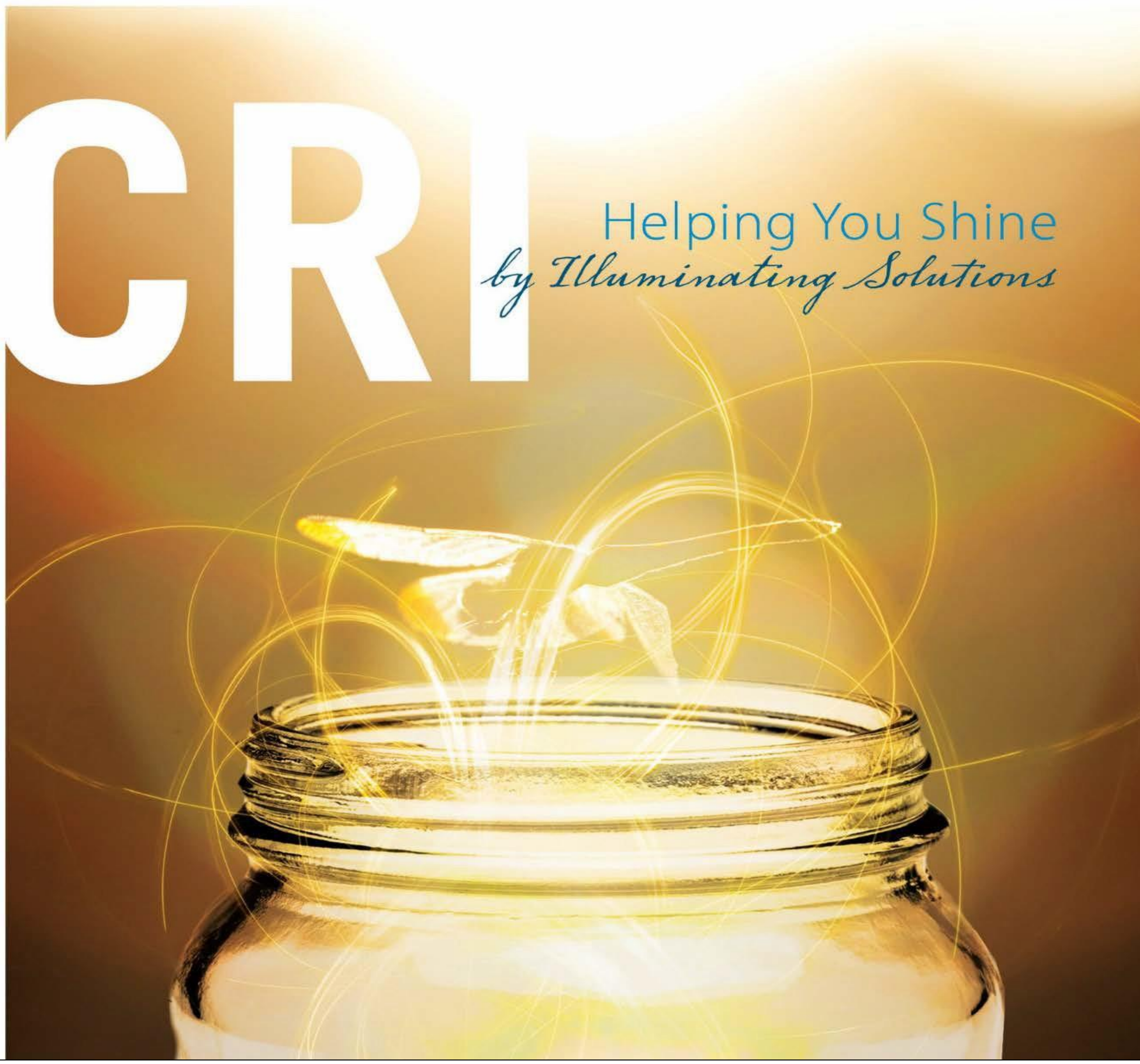


Project Understanding and Approach

Our Understanding of the Work

It is our understanding that the City of Gainesville is seeking to retain qualified professionals who can accurately scope, run and successfully complete projects in the following subject areas:

- Organizational Design
- Human Resource Policy
- Technology (Information, Data Collection, Citizen Engagement, Etc.)
- Project Management
- Leadership
- Executive Coaching

CRI Solutions Group is submitting this Statement of Qualifications to cover all requested subject areas. For each subject area, we have included:

- Representative project/engagement qualifications
- A representative example of a project/engagement task list

Obviously, as specific projects are scoped, these project tasks will change to meet the needs and specifications of the project itself and the city.

Organizational Design

Proposed Sr. Consultant: Julie S. Noonan, SPHR

Organizational Design Representative Project Qualification

Client: State of Tennessee, TennCare
Project Name: Medicaid Eligibility Modernization Program
Description: Client requested review of all positions and organization structure to implement in conjunction with a new Medicaid Eligibility technology solution and incorporation of approximately 600 new counselor positions over a two-year period.
Key Personnel:

- Julie Noonan, SPHR, Organization Change and Training Consultant
- State of TN Business Solutions Delivery Senior Project Director
- State of TN TennCare HR department
- State of TN Department of Human Resources

Project Budget: confidential
Time Required to Complete: 2 years (and ongoing)
Research Methods:

- Key person interviews
- Review of existing job descriptions/classifications and salary ranges
- Market and industry comparisons (other states)
- Published professional association certification job descriptions, skills/competencies, and salary ranges for eligibility counselors, call center staff and management

Client: State of Tennessee Treasury Department
Project Name: Human Capital Strategy & Organization Redesign
Description: Conducted review and assessment of all divisions within the department, including retirement, revenue, etc. Created strategic change plan for all process and job changes. Redesigned the organization structure to match new operating model. Created and classed new positions and worked with organization's compensation department to add salary ranges. Created new performance management process and worked with HR and the Commissioner to implement the strategy.
Key Personnel:

- Julie Noonan, SPHR, Organization Change and Human Capital Consultant
- Commissioner of Treasury Department
- Division Heads
- Department of Human Resources
- Treasury Human Resources Lead

Project Budget: confidential
Time Required to Complete: 18 months
Research Methods:

- Key person interviews
- Review of existing job descriptions/classifications and salary ranges
- Published professional association certification job descriptions, skills/competencies, and salary ranges for accountants, financial professionals and administrative/clerical staff

Organizational Design Representative Project Schedule

Organizational Design Representative Project Task List – Phase 1 Project Kickoff and Data Gathering

Activities	Inputs	Deliverables
Hold kick-off meeting. Conduct targeted interviews. Gather applicable artifacts/data.	From Project Sponsors (in collaboration with appropriate consultant): • Description of project and why the project is necessary. • Project scope statement. • List of project goals, objectives, sponsor expectations, and success metrics. • List of representative persons to interview to gather needed current state versus future state data. From Subject Matter Experts in Affected Areas: • Any documented policies and/or procedures From HR: • Existing organization charts, position titles, position descriptions, number of employees in each position. • Any existing standard performance measures for each position. • City-specific policies governing number of positions, span of control, budget, job classifications, separation rules and procedures, candidate application, interview, selection rules and procedures, etc.	Current State Analysis Detailed Project Plan Communication/Change Management Plan Sponsor Update

Organizational Design Representative Project Task List – Phase 2 – Analysis and Future State Definition

Activities	Inputs	Deliverables
Continue interviews. Create structural options with pros/cons. Gain decision on future state organizational structure. Create draft job descriptions and families. Create draft career ladder. Develop Market Analysis approach.	• Interview scripts. • Gathered artifacts. • Comparative market data (if appropriate). • Decision on future state organizational structure. • Feedback on appropriate comparative markets as needed.	Future State Organizational Structure Options with Pros/Cons Future State Job Descriptions for Review and Approval (includes Knowledge, Skills, Abilities) Draft career Ladder Market Analysis Approach Sponsor Status Updates

Organizational Design Representative Project Task List – Phase 3 – Implementation Planning

Activities	Inputs	Deliverables

Revise proposed job descriptions based on reviews. Conduct clarification meetings as needed. Determine need for training/create training plan.	• Existing Civil Service Policy/Procedure documentation • Draft deliverable review comments. • Clarification meeting scripts.	Detailed Implementation Plan Interview Scripts Employee Communications Training Plan

Organizational Design Representative Project Task List – Phase 4 – Implementation & Close

Activities	Inputs	Deliverables
Manage communications. Manage interview/placement process. Conduct training as needed. Formal presentation of final deliverables.	• Implementation Plan • Employee Feedback	Employee Communications Employee Feedback Survey and/or Focus Groups Training Final Deliverables

Human Resource Policy Subject Area

Proposed Sr. Consultant: Julie S. Noonan, SPHR

Human Resource Policy Representative Project Qualification

Client: Maxim Healthcare
Project Name: Maxim Healthcare Human Capital Strategy & Planning
Description: As part of an overall Human Capital Planning project for the organization, the client requested a review and revision of the Human Resources Policy documentation.
Key Personnel:

- Julie Noonan, Organizational Change & Human Capital Consultant
- VP Human Resources
- Human Resources Department Heads
- Business Department Heads
- Third party legal counsel

Project Budget: confidential
Time Required to Complete: 18 months
Research Methods:

- Review of existing policy documentation.
- Review of latest employment law documentation (via SHRM and SHRM Global)
- Review of State of Maryland and Pennsylvania specific HR policy laws.

Human Resource Policy Representative Project Schedule

Human Resource Policy Representative Project Task List – Phase 1 Project Kickoff and Data Gathering

Activities	Inputs	Deliverables
Hold kick-off meeting. Conduct targeted interviews. Gather applicable artifacts/data.	From Project Sponsors and HR (in collaboration with appropriate consultant): • Description of project and why the project is necessary. • Project scope statement. • List of project goals, objectives, sponsor expectations, and success metrics. • List of representative persons to interview to gather needed current state versus future state data • Existing policies, including any research conducted prior to the project start. • Any specific legislation governing HR policy. • Identify appropriate policy governance process (approval process) and communication requirements.	Current State Analysis Detailed Project Plan Sponsor Update

Human Resource Policy Representative Project Task List – Phase 2 – Analysis and New Policy Draft(s)

Activities	Inputs	Deliverables
Continue interviews. Identify needed policy changes. Create draft policy statements for changes. Review draft policy statements with appropriate governance/sponsors. Gain approval to proceed.	• Federal, State, Local HR regulations. • Existing HR policies. • Review of proposed HR policy changes.	Comprehensive list of needed new policy statements or changes to existing policy statements. Draft policy statements. Governance review documentation. Approved draft policy changes.

Human Resource Policy Representative Project Task List – Phase 3 – Implementation Planning

Activities	Inputs	Deliverables
Final draft of HR policies document. Conduct clarification meetings as needed. Gain acceptance and sign-off of final, approved HR policy document. Create Communication Plan. Determine if training is needed.	• Governing body approval. • HR/Communications team(s) input regarding implementation.	Detailed Implementation Plan Communication Plan Training Plan Sponsor Updates

Human Resource Policy Representative Project Task List – Phase 4 – Implementation & Close

Activities	Inputs	Deliverables
Create and manage communications. Conduct training as needed.	• Implementation Plan • Legal Counsel Feedback	Communication artifacts Training Final Deliverables

Technology

Consultants: Dr. Tammy Wingo, John Ternent

Technology Representative Project Qualifications

Client: Comcast
Project Name: Social Media Data Insights and Visualization
Description: The main objective of this project was to gain additional insight into the customer base, campaign success rate, and competition by utilizing external data sources of social media and developing sophisticated dashboards that would display the information in real time in user-friendly graphical format for easy interpretation and better data-driven decision making.
Key Personnel:

- Project manager, statistician, visualization expert, engagement manager, DBA, social media data expert, analysts

Project Budget: confidential
Time Required to Complete: 8 months
Research Methods:

- The only research methods required here was identification of external data sources to be used for social media information. Various sources were identified, vetted, and a select subset of those were chosen as the most valuable.

Client: Vanderbilt Health Affiliated Network
Project Name: Population Health Initiative
Description: This project was focused on improving clinical programs to better manage the health of the patient population as it related to network savings associated with an ACO model and value-based care as opposed to the fee for service model. The intent was to put a more focused more effective monitoring program in place that would allow the executives and physicians to monitor program success and determine savings dollars associated with the methodology. This involved determining the best methods and approach for utilizing data from submitted claims as well as EHR data for measuring quality of care and success of the program while displaying that information for tracking purposes in visually appealing dashboards.
Key Personnel:

- Visualization / Dashboard design expert, healthcare industry expert, project manager, engagement manager, claims data expert

Project Budget: confidential
Time Required to Complete: 6 months
Research Methods:

- No research was necessary for this project although significant data analysis was performed on existing claims data to determine appropriate KPIs and other measurements of quality and outcomes.

Technology Representative Project Schedule

Technology Representative Project Task List – Phase 1 Project Kickoff and Data Gathering

Activities	Inputs	Deliverables
Hold kick-off meeting. Conduct targeted interviews. Gather applicable artifacts/data.	From Project Sponsors (in collaboration with appropriate consultant): • Description of project and why the project is necessary. • Project scope statement. • List of project goals, objectives, sponsor expectations, and success metrics. • List of representative persons to interview to gather needed current state versus future state data	Current State Analysis Detailed Project Plan Sponsor Update

Technology Representative Project Task List – Phase 2 – Analysis

Activities	Inputs	Deliverables
Detailed investigation into current infrastructure and architecture	Inventory of current infrastructure status, hardware, software being used, versions, licensing, etc.	Recommended infrastructure if changes are needed
Identification of tools needed (software, BI, ETL, etc.)	Inventory of software products, version, updates needed, any additional software required If software is required, assist with software selection, RFP process, and selection of appropriate software packages given need and budget.	Recommended software updates, purchases, etc.
Data analysis	Data dictionary, schemas, tables, location of data, databases being used, quality and integrity of data	Data assessment and maturity model
Resource availability	Determination of resources required (staffed) for ongoing support of the final deliverable	Assessment and recommendation for any staffing changes that might be needed to support implemented solution

Technology Representative Project Task List – Phase 3 – Implementation Planning

Activities	Inputs	Deliverables
Pre-Implementation Planning meeting Establish method of communication for phases of implementation Determine necessary training, and develop a training manual or other means for educating the organization on the newly implemented product	Organize with key stakeholders the full details of the implementation, timeline, milestones, and contingency planning Determine most appropriate method for communication roll-out (who, what, when) and establish frequency of updates in general on project progress Development of training materials and methodology for full handoff to staff post-implementation	Detailed Implementation Plan Communication Plan Training Plan

Technology Representative Project Task List – Phase 4 – Implementation

Activities	Inputs	Deliverables
Execution of Phase 3	• Implementation with iterative cycles of feedback and revision	Fully implemented product with trained staff, education materials and successful handoff

Project Management

Consultants: Dione Hasse, Alex Irishkov, Mark Adkins

Project Management Representative Qualifications

Client: Nissan
Project Name: Japanese Sarbanes Oxley Assessment and Systems Infrastructure build
Description: Assisted in the development of JSOX compliance objectives, IT policies and procedures and execution of internal testing. Managed issues, and remediation of control areas including the implementation of major control processes for security, change management and operations. Served as the PMO lead of a 200+ resource initiative; representing one of Nissan's top three IS objectives for the fiscal year. Developed, led and completed multiple weekly working and status sessions across IS and IS senior management and responsible for solutioning and closing over 168+ issues and managing vendors to drive results (IBM, Satyam).
Key Personnel:

- Dione Hasse, Partner and Program Manager Organizational (PMO) Leader
- Chief Information Officer
- Senior Vice President of Finance
- Director of Infrastructure for the North Americas
- Director of Applications and Systems

Project Budget: confidential
Time Required to Complete: 2+ years
Research Methods:

- Key stakeholder interviews
- Facilitated working and strategy sessions with international leadership and entities
- Technological reviews and assessment of reporting capabilities

Client: PIC North America
Project Name: Project Management and Support of reporting capabilities to PIC's Latin American business region without sub-ledger detail populating through Oracle.
Description: Three core areas of scope were managed and executed by the team: Consolidation of accurate and timely actual, forecast and budget data into a single source for analysis, build out of reporting capabilities from the consolidated data source, and expansion of reporting capabilities to the Latin American business region.
Key Personnel:

- Mark Adkins, Program Manager and Program Manager Organizational (PMO) Leader
- Dione Hasse, Partner and Quality Assurance
- Vice President of Finance for North America
- Business Analyst and Financial Reporting Leadership
- Chief Information Officer

Project Budget: Confidential
Time Required to Complete: 3+ years
Research Methods:

- Key stakeholder interviews
- Facilitated working and strategy sessions with international leadership and entities
- Technological reviews and assessment of reporting capabilities

Project Management Representative Project Schedule

Project Management Representative Project Task List – Phase 1 Project Kickoff and Data Gathering

Activities	Inputs	Deliverables
Schedule and hold kick-off meeting. Create Project Plan. Build Project Management templates.	From Project Sponsors and Key Team Leaders (in collaboration with appropriate consultant): • Description of project and why the project is necessary. • Project scope statement. • List of project goals, objectives, sponsor expectations, and success metrics. • Project organization chart including all project personnel and percent time allocation. • Project Budget. • Project Goals.	Detailed Project Plan Sponsor Update Risk Mitigation Matrix Issues Log with follow up actions Meeting Agendas

Project Management Representative Project Task List – Phase 2 – Project Planning

Activities	Inputs	Deliverables
Complete Work Breakdown Structure. Create Project Schedule. Review high-level Project Schedule with appropriate governance/sponsors. Gain approval to proceed.	• Detailed work breakdown structures/tasks from team leads. • Detailed milestones list. • Project Impacts and Influencers.	Work Breakdown Structure Project Schedule Approved Project Schedule

Project Management Representative Project Task List – Phase 3 – Project Execution

Activities	Inputs	Deliverables
Baseline the Project Schedule and Budget. Monitor execution of project tasks and budget/spend. Adjust Project Schedule and/or budget as needed.	• Status updates/work product from project teams. • Regular working sessions. • One on one reviews with project owners, SMES and team leadership and sponsors. • Review of risks.	Project Status Reports Sponsor Updates

Project Management Representative Project Task List – Phase 4 – Implementation

Activities	Inputs	Deliverables
Determine "go/no go" Create Detailed Implementation Plan Monitor Implementation and adjust as necessary	• Issues, risks as reported by team leads and/or end users • Employee, sponsor, citizen feedback	Communication artifacts Feedback survey and/or focus groups Status Reports

Project Management Representative Project Task List – Phase 5 – Project Close

Activities	Inputs	Deliverables
Prepare success metrics report. Complete transition items. Close Project.	• Continued issues, risks as reported by team leads and/or end users • Employee, sponsor, citizen feedback	Communication artifacts Final Project Status Report

Leadership

Consultant: Julie Noonan, SPHR

Leadership Representative Qualifications

Client: Wells Fargo Bank
Project Name: Commercial Bank Curriculum Development
Description: Led teams of instructional designers and trainers to develop and implement leadership, management and related "soft skills" training. The eventual curriculum included the bank's commercial management program for entry-level manager candidates, a mentoring program for mid-senior level managers, partnership with a local university to provide an MBA program specific to commercial banking and extensive leadership development course delivery.
Key Personnel:

- Julie Noonan, Curriculum Lead
- 15+ Instructional Designers
- 45+ Trainers
- HR Business Partner
- Recruiting Partners

Project Budget: confidential
Time Required to Complete: 2 years
Research Methods:

- Review of successful leadership development programs at other large financial institutions
- Research into best-in-class curriculum design via ASTD

Leadership Project Representative Project Schedule

Leadership Project Representative Task List – Phase 1 Project Kickoff and Data Gathering

Activities	Inputs	Deliverables
Hold kick-off meeting. Conduct targeted interviews. Gather applicable artifacts/data.	From Project Sponsors (in collaboration with appropriate consultant): • Description of project and why the project is necessary. • Project scope statement. • List of project goals, objectives, sponsor expectations, and success metrics. • List of representative target leaders. From HR: • Existing organization charts, position titles, position descriptions, number of employees in span of control for each leader. • Any existing standard performance measures for various levels of leaders. • Policies regarding upward mobility/career paths for leadership positions. • Existing leadership training, mentoring programs, executive coaching engagements, etc.	Current State Analysis Detailed Project Plan Communication/Change Management Plan Sponsor Update

Leadership Project Representative Task List – Phase 2 – Analysis and Future State Definition

Activities	Inputs	Deliverables
Continue interviews. Conduct assessment to determine organizational leadership competencies. Gain agreement and approval for standard organizational leadership competencies. Evaluate existing leadership program/training, etc.	• Performance metrics for all leadership levels if available. • Existing defined standard competencies. • Existing leadership program materials (training, mentoring programs, etc.)	Approved Standard Organizational Leadership Competencies Existing Leadership Program Evaluation Sponsor Status Updates

Leadership Project Representative Task List – Phase 3 – Implementation Planning

Activities	Inputs	Deliverables
Create Leader Evaluation Process and Tools. Develop Leadership Development Program Draft. Gain approval to proceed with Leader Evaluation Process and Leadership Development Program Implementation. Create Program Communications Plan.	• Feedback from HR, identified Leadership sponsors.	Detailed Implementation Plan Program Communications Leader Evaluation Process and Tools Leadership Development Program Sponsor Status Updates

Leadership Representative Project Representative Task List – Phase 4 – Implementation

Activities	Inputs	Deliverables
Manage program communications. Conduct leader evaluations and provide individual feedback. Create/purchase leadership training. Conduct leadership training as needed. Create other aspects of Leadership Development Program (i.e., mentoring program etc.)	• Implementation Plan • Employee Feedback	Employee Communications Individual Leader Evaluations and 1:1 evaluation discussion Individual Leader development recommendations Leadership Training Other Leadership Development Program initiatives Sponsor Status Updates

Leadership Project Representative Task List – Phase 5 – Project Close

Activities	Inputs	Deliverables
Transition Leadership Development Program to HR (or other appropriate internal resource) Formal presentation of final deliverables.	• Final Deliverables.	Completed and approved deliverables.

Executive Coaching

Consultant: Julie Noonan, SPHR

Executive Coaching Representative Qualifications

Client: Ernst & Young
Project Name: Center for Business Knowledge Executive Staff Coaching
Description: Worked with 9 members of the global executive staff of Ernst & Young's Center for Business Knowledge to identify areas for continued professional and personal development. Administered 360 feedback assessments, reviewed with executives and created specific coaching plans for each.
Key Personnel:

- Julie Noonan, Executive Coach

Project Budget: confidential
Time Required to Complete: 6 months
Research Methods:

- Administration of 360 assessment tool
- Analysis of assessment results

Executive Coaching Representative Engagement Project Schedule

Executive Coaching Representative Engagement Task List – Phase 1 Engagement Kickoff and Data Gathering

Activities	Inputs	Deliverables
Hold kick-off meeting. Conduct targeted interviews with sponsors. Gather applicable artifacts/data.	From Project Sponsors (in collaboration with appropriate consultant): • Understand the need for coaching and who will be coached. From HR: • Existing organization charts, position titles, position descriptions, number of employees in span of control for each executive coach candidate. • Any existing standard performance measures for targeted executive coach candidates. • Performance evaluations for executive coach candidates. • Succession information; high potential information. • Standard Leadership Competencies. • Existing leadership training, mentoring programs, executive coaching engagements, etc.	Executive Coaching Approach document Sponsor Update

Executive Coaching Representative Engagement Task List – Phase 2 – Executive Coaching Individualized Program Creation

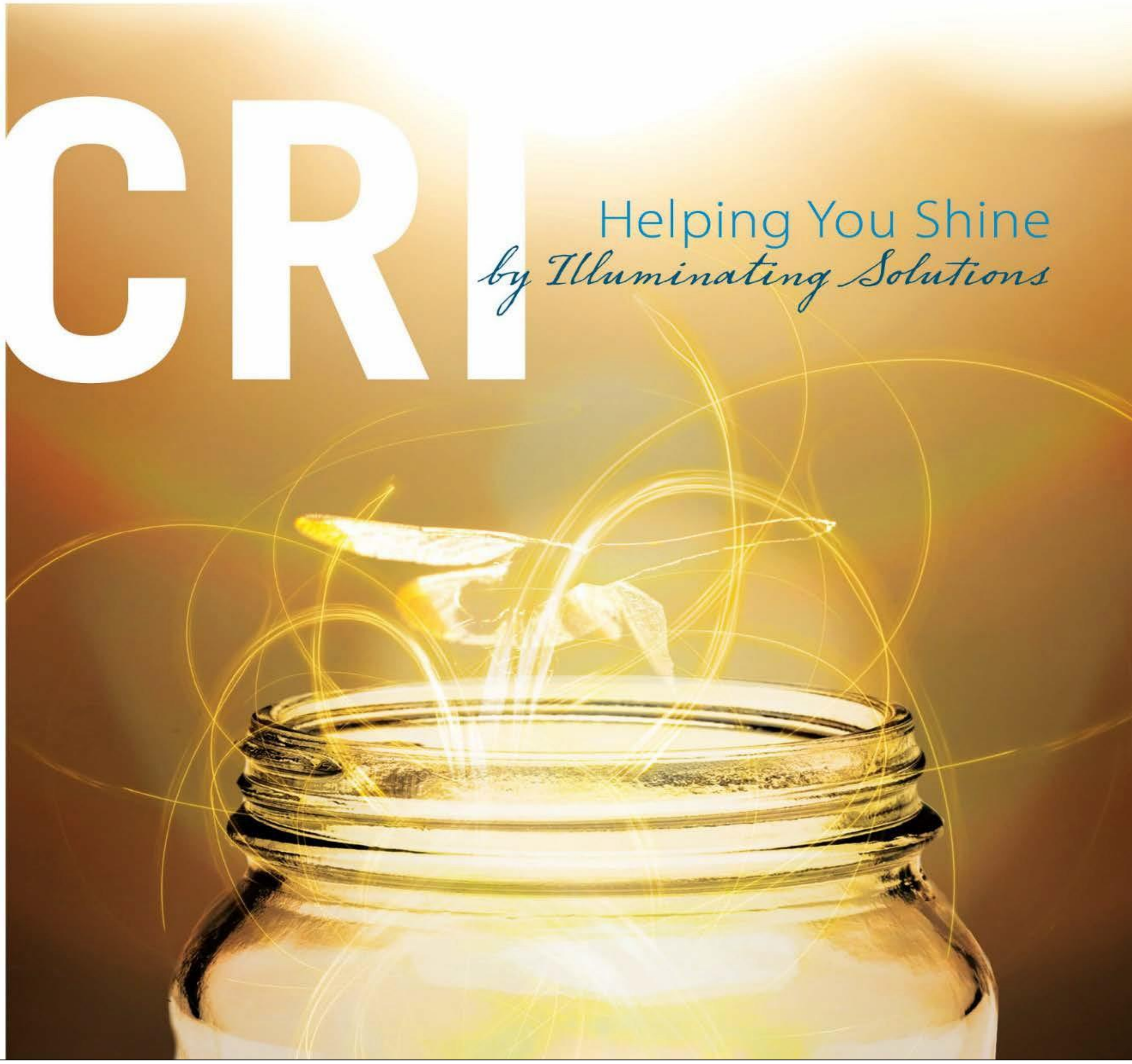
Activities	Inputs	Deliverables
Hold first interview with each executive coaching candidate. Determine analysis approach (360 evaluation, simple survey, review of performance evaluations, etc.) Executive Coaching Contract with each executive coaching candidate (includes personal goals, measures, objectives, timeframe and accountability)	• Performance evaluation and other perceptual evaluation data.	Individualized Executive Coaching Program for each coachee Sponsor Status Updates

Executive Coaching Representative Task List – Phase 3 – Implementation

Activities	Inputs	Deliverables
Meet regularly with executive coachees to determine progress against goals, adjust action plans, etc. Check in with project sponsors re: observed behavior changes in coachees.	• Feedback from HR, identified Leadership sponsors.	Sponsor Status Updates

Executive Coaching Representative Engagement Task List – Phase 4 – Engagement Close

Activities	Inputs	Deliverables
Transition ongoing development tasks to HR or coachee supervisor Formal presentation of final deliverables.	• Final Deliverables.	Completed and approved deliverables.



Proposed Project Staff

CRI Solutions Group, LLC Consultants

We have assembled a team of professionals who will ensure the highest level of personal dedication and professional excellence to you. Our team delivers exceptional services through a balanced blend of skills (service driven, industry specific, technical and business) and experience that we know are important to you.

Brief profiles of each member of the team identified follow on subsequent pages. These key personnel will be available for projects as identified in the RFQ.

Dione Hasse
Partner, Principal, Account Executive

615.665.1811 phone
615.554.4489 mobile
dhasse@CRIcpa.com

Areas of Expertise

- Market Leadership
- Client Relationship Management
- Data, analytics, business intelligence
- Revenue Cycle
- Business continuity, disaster recovery
- Strategy & innovation
- Process assessment and improvement
- Financial and IT Audit

Experience

Accomplished Senior Level Management Consultant and Market Leader with significant expertise in defining, building, recruiting for and operating consulting practices, Ms. Hasse has extensive experience in providing solution, account and practice management leadership and execution for key projects, for both Fortune 500 companies as well as government entities. An excellent relationship builder, Ms. Hasse is known for a keen ability to listen to her clients' issues and business goals to identify the most promising solutions for business success.

Education, Licenses & Certifications

- BS, Virginia Polytechnic Institute & State University

Professional Affiliations

- Project Management Institute

Julie Noonan, SPHR
Sr. Consultant, Change Management & Human Resources

615.665.1811 phone
615.975.3733 mobile

jnoonancrisolutionsgroup@gmail.com

Areas of Expertise

- Workforce Planning
- Organization Design
- Organization Change Management
- Performance Management
- Job Classification
- Job Descriptions
- Training & Development
- Executive Coaching
- Succession Planning

Experience

Julie has over 25 years of experience in the strategic Human Resources profession with specializations in Talent Management, Organization Design, Learning & Development and Change Management.

Julie has worked with private and government organizations both as an employee as well as an external consultant. She has conducted numerous workforce analyses and developed and/or updated human capital plans to meet business and government strategies including increased revenue, reduced expense, increased efficiency, streamlined processes and overall increased employee engagement.

Education, Licenses & Certifications

- Senior Professional of Human Resources (SPHR)
- Prosci Change Management Certified
- Bachelor of Arts, Belmont Abbey College
- Master of Arts, Kent State University

Professional Affiliations

- Society of Human Resource Management
- Association of Change Management Professionals
- Prosci Change Management
- Organization Development Network

Tammy Wingo, PhD, MBA
Principal, National Analytics Practice Lead

615.665.1811 phone
615.554.4489 mobile

twingo@crisolutionsgroup.com

Areas of Expertise

- Advanced Analytics
- Analytics Visualization
- Dashboard Design and Implementation
- Reporting
- Business Intelligence
- Healthcare SME
- Tableau SME

Experience

Dr. Wingo has over 15 years' experience in the business intelligence and analytics space. She has worked with some of the largest and smallest companies across the country with experience in almost every industry. She has also worked with the State of Tennessee in Economic and Community Development efforts, working with the state commissioner in ECD to promote and educate smaller communities on growth and economic potential. She has extensive experience and knowledge in data integration, visualization, and data insight/discovery. She is a Tableau subject matter expert and has been using the tool for over 13 years for data analysis and visualization. She has a successful leadership style and has managed many business intelligence and analytics teams across many organizations over the years. She is a big picture thinker with deep strategic BI experience and has applied that knowledge throughout the years in various environments.

Her core competencies, in addition to those mentioned above, also include data integration, data-driven insight through applied scientific and statistical methodologies and operational analyses relative to workflow and supply chain management.

Dr. Wingo also has deep expertise in the healthcare industry in the BI and analytics realm. She has built and led developments of analytics and BI across multiple organizations throughout the years.

Education, Licenses & Certifications

- PhD, Vanderbilt University
- MBA, Owen Graduate School of Management at Vanderbilt
- BS, Biochemistry, University of Alabama at Huntsville
- Tableau desktop certification

John Ternent, MS Data Science, MBA
Sr. Consultant, Data Scientist & Data Architect

jternent@gmail.com

Areas of Expertise

- Data Science
- Big Data
- Data Architecture
- R, Python, SQL, NoSQL
- AWS
- Cloud Architecture

Experience

Mr. Ternent brings over 20 years' experience as a developer, architect, and data scientist to CRI. He has served as CIO and CTO of multiple organizations, and has spent the majority of his career consulting with organizations across multiple industries on data architecture, analytics, and data science. He has a broad set of technical skills that span the continuum from data management and cleansing through building and scoring predictive analytics models, to building complex natural language processing applications.

Mr. Ternent holds certifications in the Big Data arena (Hortonworks Certified Developer) and in Analytics (INFORMS Certified Analytic Professional). He has presented at multiple big data and analytics conferences on topics ranging from Hadoop to using text analytics in data science.

Originally from Bogota, Columbia, he is fluent in both English and Spanish and has managed multi-national and multi-cultural teams, both regionally and distributed.

Education, Licenses & Certifications

- MS, Data Science, University of Indiana
- MBA, University of Illinois
- BS, Computer Science, Western Kentucky University
- INFORMS Certified Analytic Professional (CAP)
- Hortonworks Certified Developer

Alex Irishkov
Sr. Consultant
Director, Regional Consulting Leader

713.791.3021 mobile   airishkov@crisolutionsgroup.com

Areas of Expertise

- Project and Portfolio Management
- Change Management and Organizational Transformation
- Business Process Transformation
- Technology Strategy and Transformation
- Finance Transformation
- Financial Budgeting, Planning and Close processes
- Strategy and Operations
- Innovation
- Enterprise Performance Management
- Reporting and Analytics
- Cloud Strategy
- Financial and IT Audit (former CIA, CISSP, CISA)

Experience

Alex is an expert at helping organizations (from large to small) transform their business processes and gain new capabilities through implementation of technology solutions, execution of innovative change management program and disciplined project management approaches. Alex has a range of experiences from defining ERP strategies to end-to-end implementation of various technology solutions ranging from 20 users to 3,000 users. He has over 15 years of expertise in working across Finance, Accounting, Supply Chain and Operations business processes. Alex has expertise in enabling planning, budgeting, forecasting, management reporting and monthly close processes. Alex works across commercial and government sector with CFO and CIO level leaders to help with the business readiness of the organization to adopt new financial processes and systems to ensure successful go-live. Alex is an accomplished market leader with significant expertise in defining, building, recruiting for and operating a consulting practice.

Education, Licenses & Certifications

- BS, International Trade and Finance – LSU
- MS, Information Systems (plus Internal Audit) – LSU

Professional Affiliations

- IIA
- ISACA

Mark Adkins
Consultant, Manager

404.433.6865 mobile madkins@crisolutionsgroup.com

Areas of Expertise

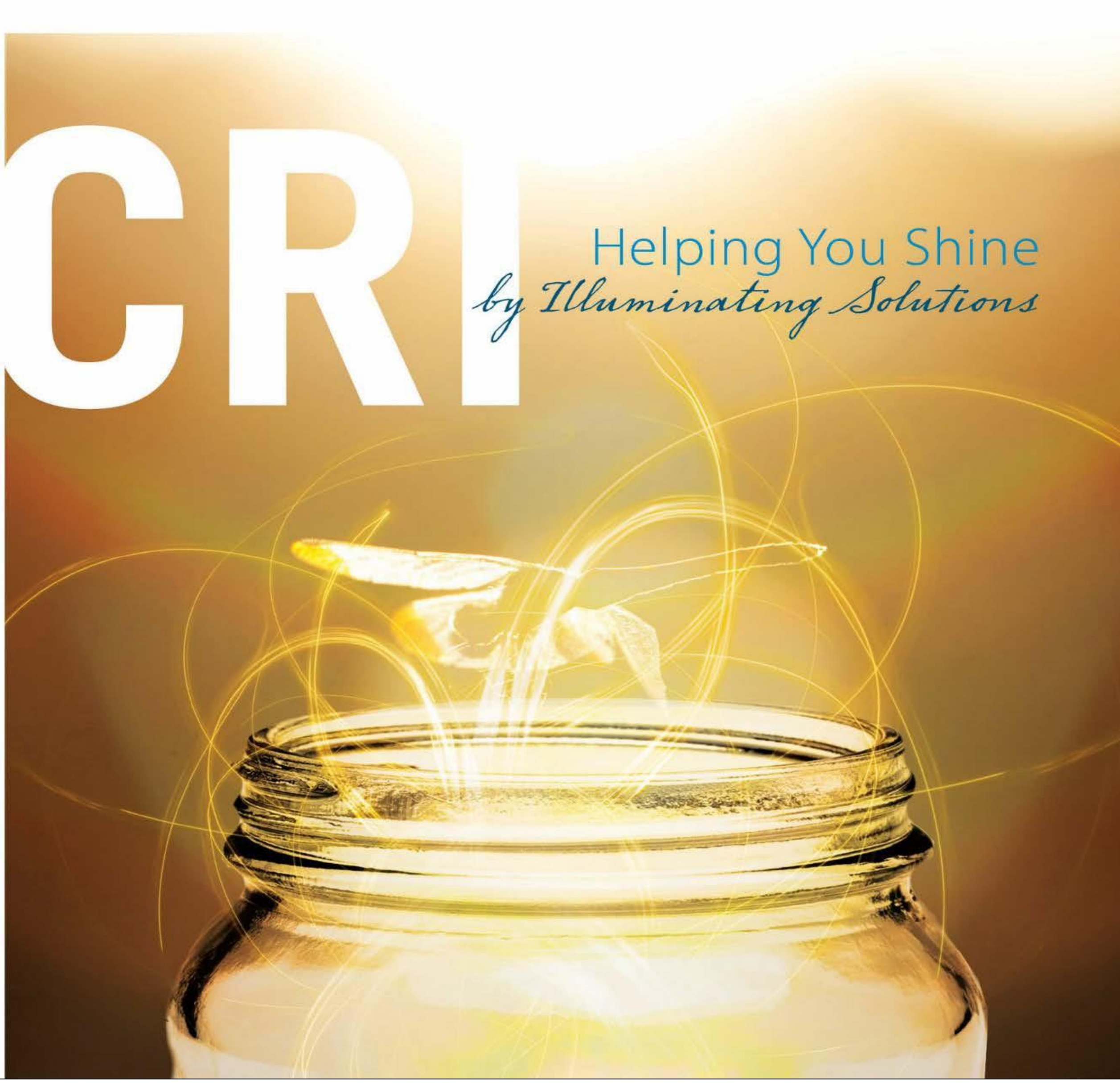
- Complex project management
- Financial planning and analysis
- Data, analytics, business intelligence
- Revenue cycle
- Consumer engagement

Experience

Mark is a management consultant with experience in supporting healthcare delivery systems with integrative and value-based care models, patient engagement, and revenue cycle management, managing complex technology transformations, and assisting companies with building business intelligence systems and processes to improve meaningful data use and value. Mark is well suited to ramp-up quickly and excel in addressing needs and solving problems across a broad range of projects and organizations.

Education, Licenses & Certifications

- BA, University of Tennessee
- MBA, Vanderbilt University Owen Graduate School of Management



Qualifications of the Firm

About CRI Solutions Group

CRI Solutions Group, LLC is a Division of Carr, Riggs, & Ingram, LLP.

CRI is a family of CPAs and business advisors who value getting to know our clients professionally and personally. This knowledge helps us deliver on our passion: advising them through their most critical business opportunities, challenges, and transitions.

Since our formation in 1997, we have experienced consistent year-over-year growth that has allowed us to deliver what our clients need to achieve their goals. We are one of the fastest-growing firms in the U.S. because we expand our service offerings to evolve with our clients' needs. For example, we recently formed the CRI Solutions Group Division which provides management consulting services to expand the advisory services we provide to our clients. This variety of service offerings combines with our commitment of getting to know our clients, and the result is tailored client service.

CRI has 44 offices located in nine (9) states throughout the southern United States. Over 40% of our work is concentrated on government auditing. Through this extensive involvement in the government arena, we have developed a national reputation for our expertise in government auditing. With CRI Solutions Group, we are developing deeper management advisory services for our government clients.

CRI delivers a depth of resources that ensures our understanding of your challenges and innovative solutions for overcoming them. Our governmental team's combined experience is derived from providing services to a client base that includes:

- 450+ governmental entity clients across the South totaling approximately $22 billion in total revenues, and
- Municipality clients of up to $1.2 billion in total revenues.

We parlay this vast experience and derived best practices into proven solutions that benefit you.

CRI has a total complement of 2100 technical and professional personnel as follows:

300 Partners

1,800 Professionals

Management Consulting Services

Advanced Analytics and Data Science

Helping clients become faster and more evolved with their decision-making capabilities with right mix of mind and machine to leverage data

- Data Management – People, Process & Technology
- Data Science delivering insights using predictive and prescriptive solutions
- Visualization and Reporting across industries

Customer Impact and Experience

Helping clients evaluate, and create unique and streamlined customer (and patient) experiences

- Enhanced Customer Engagement modeling and implementation
- Delivery of connected experiences framework that grow client businesses and their brands
- Customer experience in generating value for client customers and their business

Industry Specific Expertise

Helping clients become efficient in adopting trends and legislation specific to their industry while operationalizing industry innovation.

- Healthcare – Revenue Cycle Management, Patient Experience, Population Health while supporting the application of analytical concepts to drive results and insight
- Banking – Risk and Compliance, Digital Experience and Analytics
- Insurance – Payer and Provider Analytics, Process and Program Leadership
- Manufacturing – Process and Program Leadership, Customer Experience and Analytics

Innovation and Strategy

Helping C level executives, especially the CIO in exploring steps and factors as they reimagine vision, forecasting and operations in a way that allows them to deliver more value to their organizations. We partner with our clients with innovation initiatives in helping them take a new service or product offering from the idea stage to production.

- Strategic Roadmap Development and Assessment
- ROI and Cost Control
- Vendor Performance Analysis
- Executive Leadership Outsourcing – non-audit clients
- Enhanced customer engagement modeling and implementation
- Delivery of connected experiences framework that grow client businesses and their brands
- Workforce Planning

Program and Process Leadership

Helping clients navigate and successfully implement change within and across their organizations – people, process and technology

- Project and program management (PMO)
- System Selection and Implementation - non audit clients
- Process assessment and reengineering
- Training and change management
- Mergers & Acquisitions – non audit clients

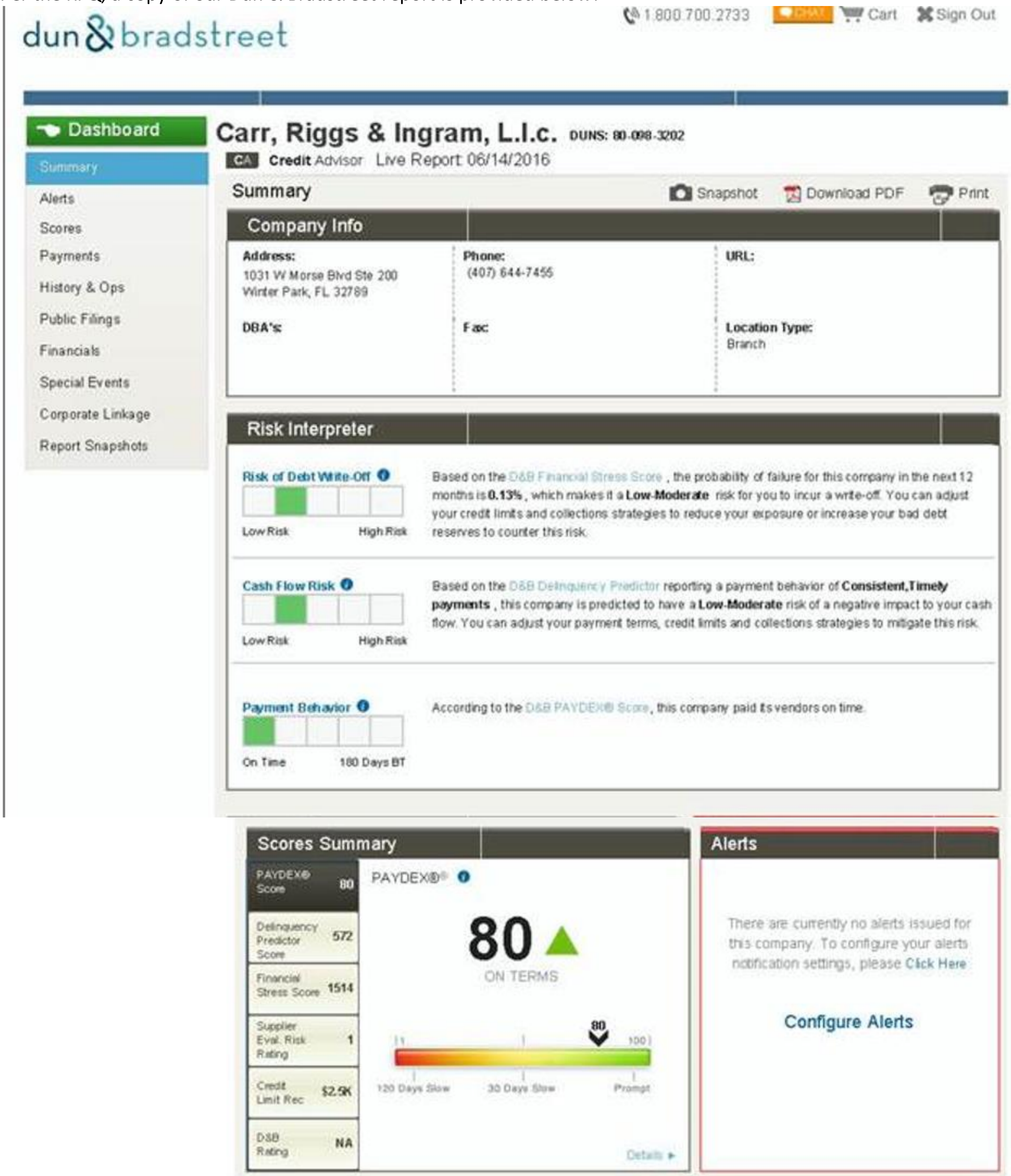
Business Resumption Planning

Helping clients become prepare and response to disaster and threats

- Business Continuity Planning
- Disaster Recovery Planning
- Risk Planning
- Workplace Disruption Planning

D&B Report

Per the RFQ, a copy of our Dun & Bradstreet report is provided below:



Payments Summary

Current PAYDEX®:	80	Equal to generally within terms		
	Industry Median:	80	Equal to GENERALLY WITHIN terms	
Payment Trend:	↔	Unchanged, compared to payments three months ago		

Total payment Experiences in D&Bs File (HQ):	182
Payments Within Terms (not dollar weighted):	100 %
Total Placed For Collection:	NA
Average Highest Credit:	512
Largest High Credit:	100,000
Highest Now Owing:	250
Highest Past Due:	NA

Details ▸

Certificate of Insurance

The firm's Certificate of Insurance, as requested in the RFQ is presented below:

CARRR-2 OP ID: JR

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) 06/21/17

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 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).

PRODUCER
Whittaker-Warren Insurance
P.O. Box 311283
Enterprise, AL 36331
Forrest J. Warren
334-347-2631
334-393-2345

CONTACT NAME:
PHONE (A/C, No, Ext): FAX (A/C, No):
E-MAIL ADDRESS:

INSURER(S) AFFORDING COVERAGE	NAIC #
INSURER A : Continental Insurance Company	35289
INSURER B : American Casualty Company of	20427
INSURER C :	
INSURER D :	
INSURER E :	
INSURER F :	

INSURED
Carr, Riggs, & Ingram, LLC
P.O. Box 312044
Enterprise, AL 36331

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 INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	GENERAL LIABILITY: X COMMERCIAL GENERAL LIABILITY; CLAIMS-MADE; X OCCUR; GEN'L AGGREGATE LIMIT APPLIES PER: POLICY; PRO-JECT; X LOC			6045711126	01/07/17	01/07/18	EACH OCCURRENCE	$ 1,000,000
							DAMAGE TO RENTED PREMISES (Ea occurrence)	$ 500,000
							MED EXP (Any one person)	$ 15,000
							PERSONAL & ADV INJURY	$ 1,000,000
							GENERAL AGGREGATE	$ 2,000,000
							PRODUCTS - COMP/OP AGG	$ 2,000,000
							Emp Ben.	$ 1,000,000
A	AUTOMOBILE LIABILITY: X ANY AUTO; ALL OWNED AUTOS; SCHEDULED AUTOS; HIRED AUTOS; NON-OWNED AUTOS			6045711112	01/07/17	01/07/18	COMBINED SINGLE LIMIT (Ea accident)	$ 1,000,000
							BODILY INJURY (Per person)	$
							BODILY INJURY (Per accident)	$
							PROPERTY DAMAGE (Per accident)	$
								$
A	X UMBRELLA LIAB; X OCCUR; EXCESS LIAB; CLAIMS-MADE; DED; X RETENTION $ 10000			6045711143	01/07/17	01/07/18	EACH OCCURRENCE	$ 20,000,000
							AGGREGATE	$ 20,000,000
								$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY Y/N; ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH); If yes, describe under DESCRIPTION OF OPERATIONS below	N/A		6045689709	12/31/16	12/31/17	X WC STATU-TORY LIMITS; 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

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

CERTIFICATE HOLDER

CITYWEO

City of West Orange
2700 Western Avenue
West Orange, TX 77630

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

Certification Regarding
Drug-Free Workplace Requirements

A. The grantee certifies that it will or will continue to provide a drug-free workplace by:

1. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the work place and specifying the actions that will be taken against employees for violation of such prohibition.

2. Establishing an on-going drug-free awareness program to inform employees about:

(a) the dangers of drugs in the workplace;
(b) the grantee's policy of maintaining a drug-free workplace;
(c) any available drug counseling, rehabilitation, and employee assistance programs; and
(d) the penalties that may be imposed upon employees for drug abuse violations occurring in the workplace

3. Making it a requirement that each employee to be engaged in the performance of the grant be given a copy of the statement required by paragraph 1.

4. Notifying the employee in the statement required in paragraph 1 that, as a condition of employment under the grant, the employee will:

(a) abide by the terms of this statement;
(b) notify the employer in writing of his or her conviction for a violation of a criminal drug statute occurring in the workplace no later than five calendar days after such conviction.

5. Notifying the grantor agency, H-GAC, in writing, within ten calendar days after receiving notice under subparagraph 4(b) from an employee or otherwise receiving actual notice of such conviction. Employers of convicted employees must provide notice, including position title, to every grant officer or other designee on whose grant activity the convicted employee was working, unless the Federal agency has designated a central point for the receipt of such notices. Notice shall include the identification number(s) of each affected grant.

6. Taking one of the following actions, within 30 calendar days of receiving notice under subparagraph 4(b), with respect to any employee who is convicted:

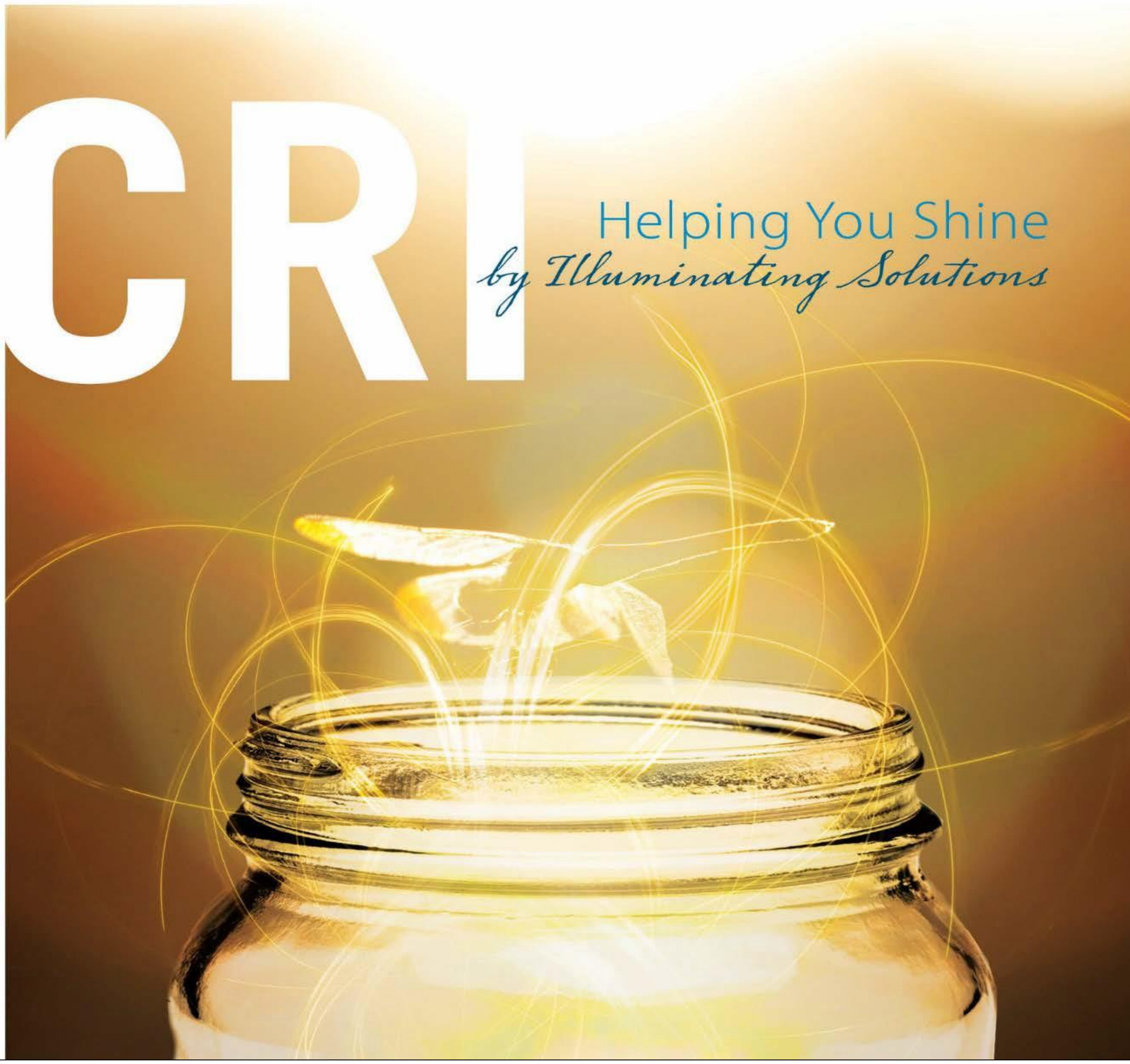
(a) Taking appropriate personnel action against such an employee, up to and including termination, consistent with the requirements of the Rehabilitation Act of 1973, as amended; or
(b) Requiring such employee to participate satisfactorily in a drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State, or local health, law enforcement, or other appropriate agency;

7. Making a good faith effort to continue to maintain a drug-free workplace through implementation of paragraphs 1, 2, 3, 4, 5, and 6.

Name of Applicant Organization: Carr, Riggs & Ingram, LLC

Name and Title of Authorized Signatory: Dione Hasse, Partner

Signature: Dione Hasse Date: 2/8/2018



Additional Information

Attachment A – HOURLY RATES

Respondent's Name: CRI Solutions Group, LLC

Job Title	Partner/Principal	Director	Senior Manager	Manager	Senior Consultant/Consultant
Hourly Rate	$280	$220	$195	$185	$175

CRI Solutions Group, LLC rates by resource level are consistent across project areas. The rates listed above apply to each project area presented to CRI Solutions Group, LLC. We guarantee consultants at every level with advanced degrees and a vast tenure of experience and seasonality. Our consultants are Subject Matter Experts (SMEs) across and deep within their area of expertise from advanced analytics and human capital consulting to technology and project management. Most engagements are staffed by Managers and Senior Managers and we invest "free time" from Partners, SMEs and Directors across practices at no cost to our clients at a minimum of 5 – 15 hours per week. Our consultants and managers maintain a level of expertise ranging from 10 to 25 plus years of experience in consulting in their area of expertise, thus guaranteeing results at competitive rates.