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Proposal to Provide Enterprise Resource Planning (ERP) Consultancy Services

February 26, 2025
RFP # 2025-017

Submitted to:
North Central Texas Council of Governments
TXShare Cooperative Purchasing Program
Submitted via: www.publicpurchase.com

Submitted by:
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February 26, 2025

North Central Texas Council of Governments
TXShare Cooperative Purchasing Program
Submitted via: www.publicpurchase.com

To whom it may concern:

Crowe LLP is pleased to submit our response to North Central Texas Council of Governments (NCTCOG) Request for Proposal for Enterprise Resource Planning (ERP) Consulting Services.

Crowe is a public accounting, consulting, and technology firm with offices around the world, including five locations in Texas. Our vision is built on deep specialization and a focus on our clients, our people, and the hallmarks of our profession: integrity, objectivity, and independence. We have an experienced Public Sector Consulting practice that specializes helping governmental and non-profit agencies optimize their processes and deliver constituent services successfully. We are confident our team will meet and exceed NCTCOG's expectations. We highlight the following attributes that our team will bring your members:

- **Full service, national accounting, consulting, and technology firm.** We are a national top firm with more than 37 offices across the country, including **Dallas, Houston, Austin, El Campo, and The Woodlands, Texas**. Our team brings national credentials and experience, including dozens of consulting clients in Texas. In addition, we can pull in financial, benefits, accounting, and management specialists across our firm. This means that NCTCOG and other public sector entities will benefit from our core project team of public sector specialists ***and*** have access to specialists across our firm to help address complex questions or issues that tend to arise during a compensation study.
- **Public Sector Specialization.** We have over 300 consultants dedicated to serving governments. We have been serving local, state, and federal government entities for over 50 years, including cities, counties, utilities, educational agencies, special districts, nonprofits, and other public entities. Many of our team members have worked for local governments prior to joining Crowe. We bring deep specialization in public administration, government assessments and studies, and strategic project management services for the public sector. We are also passionate about the public sector – we are on this team because we believe in your mission.
- **ERP Consulting Specialization** – Crowe has been providing consulting services supporting ERP platforms in the public and private sector since the inception of financial management systems, ***including ERP assessments, strategies, procurements, and implementations.*** We understand the IT landscape and have a dedicated consulting practice that provides the ERP and IT assessment, and strategy services. Crowe brings broad industry experience working with ERP systems across the country and are positioned to leverage this experience to the State with detailed analysis and a sound ERP Roadmap.
- **Business Process Analysis and Business Process Re-engineering (BPR)** - Crowe possesses unmatched experience in providing functional process improvement services. Our approach focuses on complete end-to-end business process structures and appropriate decomposition, clearly documenting the associated pain points, exception processes, rework, corrections, manual processing, backlogs, issues, and variations due to different mandated requirements.

Working directly with you, we leverage our experience to analyze the gap between where you are and where you want to be, collaborating with you to achieve a future state that is aligned with your desired goals and outcomes.

- **Technical Assessment** – Crowe has decades of experience performing technical assessments, and our team has deep experience analyzing technology and determining gap areas. We are passionate about technology and have seen the positive impact that well-functioning enterprise systems can have on our clients and seek to help our clients better utilize technology.
- **Project management and stakeholder facilitation rigor**. Crowe has experienced, certified project managers to keep our projects on-time and on-budget. We have successfully managed public sector projects like what NCTCOG is seeking, including with complex data collection, quality control, analysis, and engagement with leaders and key stakeholders throughout the work. Our project managers and senior project managers are highly skilled in managing schedules to proactively protect against delays, emphasize high-quality work, and communicate regularly and consistently with your team as we work to deliver an exceptional client experience for you.
- **Flexibility and experience serving multiple clients under Master Service Agreements (MSAs)**. We are experienced in delivering services to numerous clients under MSAs and bench contracts, and we are flexible to tailor our approach to each participating client to best meet their goals. We work extensively with clients through the federal GSA Multiple Award Schedule, the California Multiple Award Schedules, and the State of Illinois JPMC Internal Auditing Services contract, to name a few. We are a large team of dedicated public sector professionals, and we have the capacity to serve many clients on compensation assessments concurrently, each with a dedicated project manager as the single point of contact committed to delivering results for you.

We forge each relationship with the intention of delivering exceptional client service while upholding our firm's core values – ***care, trust, courage, and stewardship*** – and strong professional standards. Crowe has delivered value to our clients for decades by listening to their needs and developing a comprehensive understanding of their businesses and would appreciate the opportunity to continue to provide unparalleled services to NCTCOG. Based upon the requirements and desired outcome of this project, Crowe has the experience and capability to make this project an unqualified success.

Crowe LLP certifies that Susannah R.K. Heitger, Principal is authorized to legally bind the firm and can be contacted for all matters pertaining to the offer.

Thank you for the opportunity to submit our proposal to NCTCOG. We are confident that after reviewing our proposal you will share our conviction that we stand apart from others – with a value driven workplace and the people, resources, attitude, and specialized service to provide the best professional services at a reasonable cost. We look forward to working with NCTCOG.

Should you have any questions or require additional information, please do not hesitate to contact me directly at 312.899.5316 or susannah.heitger@crowe.com.

Sincerely,

Susannah R.K. Heitger, *PMP, CCMP, PMO-CP*	Mark Maraccini, *CPA*
Partner-Principal	Partner

Table of Contents

Certificate of Offeror and Statement of Understanding

The initial submission pages of your proposal will consist of:

1. *Addenda acknowledgement and signature of authorized representative (page 1 of this solicitation document)*

As requested, we have provided the completed **Cover Page** at the end of this section. We acknowledge Addendum #1, posted 1/24/2025, Addendum #2, posted 2/7/2025 and Addendum #3, posted 2/25/2025.

2. *A brief statement of the respondent's understanding of the work to be done or desired deliverables requested in the solicitation.*

Our Understanding

We understand the North Central Texas Council of Governments (NCTCOG) seeks an experienced firm or firms to provide Enterprise Resource Planning (ERP) consulting services to members of NCTCOG, members of the TXShare Cooperative Purchasing Program, and potentially other public sector agencies nationwide that choose to leverage the resulting contract (members or prospective clients). We recognize that should we be awarded a contract, our services will be promoted via TXShare, thus providing Crowe the opportunity to work with various public sector entities to develop a Statement of Work that meets each entity's needs.

We understand NCTCOG and TXShare have the following key objectives related to this RFP:

- Reduce risks associated with software obsolescence and fragmented administrative environments.
- Enhance operational efficiency through standardized processes and integration of core ERP components such as accounting, human resources, and supply chain management.
- Enable TXShare entities to meet evolving regulatory and operational requirements while maintaining compliance with industry standards.
- Provide a scalable, accessible, and inclusive approach to ERP consulting services that align with the unique needs of diverse entities.

To meet these objectives, we recognize that NCTCOG and TXShare seek highly qualified vendors able to deliver solutions that drive innovation, support strategic planning, and foster long-term value for its participating entities.

We understand the work to be done will focus on ERP systems and may comprise the typical activities and services listed in NCTCOG's RFP. We invite the opportunity to customize a Statement of Work to each client to meet their goals for ERP-related consulting services.

TXShare
Your Public Sector Solutions Center

REQUEST FOR PROPOSALS
For
Enterprise Resource Planning (ERP) Consultancy Services
RFP # 2025-017

Sealed proposals will be accepted until **2:00 PM CT, Monday, February 5, 2025** and then publicly opened and read aloud thereafter.

Crowe LLP
Legal Name of Proposing Firm

Susannah R.K Heitger — Principal
Contact Person — Title

312.899.5316 — susannah.heitger@crowe.com
Telephone Number — E-Mail Address

225 West Wacker Drive, Suite 2600 — Chicago, Illinois — 60606
Street Address of Principal Place of Business — City/State — Zip

225 West Wacker Drive, Suite 2600 — Chicago, Illinois — 60606
Complete Mailing Address — City/State — Zip

Acknowledgment of Addenda: #1 SH #2 SH #3 SH #4 _______ #5 _______

By signing below, you hereby certify that the information contained in this proposal and any attachments is true and correct and may be viewed as an accurate representation of proposed services to be provided by this organization. You agree that failure to submit all requested information may result in rejection of your company's proposal as non-responsive. You certify that no employee, board member, or agent of the North Central Texas Council of Governments has assisted in the preparation of this proposal. You acknowledge that you have read and understand the requirements and provisions of this solicitation and that the organization will comply with the regulations and other applicable local, state, and federal regulations and directives in the implementation of this contract. And furthermore, that I certify that I am legally authorized to sign this offer and to submit it to the North Central Texas Council of Governments, on behalf of said offeror by authority of its governing body.

SRKH

Authorized Signature

Key Personnel

In this section, we describe our approach to allocating skilled resources to each project. Crowe has made the strategic decision to team with Texas-based, certified woman-owned firm Harris & Dickey (collectively the Crowe team).

As a top nationwide firm, we have deep bench of consultants that specialize in public sector. Crowe has 190 public sector consultants on our nationwide team – each with skillsets and knowledge specific to governmental organizations.

To allocate resources to each project, we focus on the specific activities, deliverables, and timeframes required to deliver an exceptional client experience. We then use sophisticated Centralized Resource Management function and scheduling software to identify team members with the appropriate skills, experiences, and capacity to support the project. We allocate team members to projects with a focus on capabilities and availability to give the project the attention it deserves.

For Statements of Work executed under this contract, **Partner Susannah Heitger** and **Director Jill Willis** will be directly involved in allocating resources to confirm appropriate staffing by experienced and trained staff.

In addition, as a nationwide accounting, consulting, and technology firm, we have access to financial, benefits, and management subject matter specialists across our firm. We have a "One Crowe" mentality that encourages us to pull in specialists from across the firm to best meet the needs of a client, rather than operating in siloed teams. This means NCTCOG and other public sector entities will benefit from our core project team of public sector specialists ***and*** have access to top specialists across the firm to help address specific subject matter questions or issues that may arise during an ERP-related project.

Our proposed Engagement Partner, Susannah Heitger, will oversee the engagement with NCTCOG and each client Statement of Work executed under this contract. Susannah will serve as a point of escalation as needed and confirm this project is fully resourced with a skilled team and receives the attention it requires. Should there be any issues, concerns, or problems related to this engagement, Susannah will work directly with the client entity and the project team to identify and implement corrective actions as appropriate. Susannah leads our national team of consultants dedicated to public sector business transformation services. Susannah has direct experience leading numerous ERP-related projects, organizational assessments, and organizational change management (OCM) initiatives for public sector clients – including counties, cities, state agencies, and not-for-profit organizations. Susannah is a certified Project Management Professional (PMP) by the Project Management Institute (PMI, a Certified Change Management Practitioner (CCMP) by Prosci, and a Project Management Office (PMO) Certified Professional (PMO-CP) by Project Management Institute.

As our Partnership Lead focused on promoting this TXShare contract, **Partner Mark Maraccini** will also support client Statements of Work under this contract. In addition to working with our marketing team to promote and educate governmental entities on the advantages of using this contracting vehicle and the services Crowe may provide under the contract, Mark will manage relationships with each client and serve as an additional point of escalation if there are risks, problems, or changes in those clients' Statements of Work.

We will appoint a **Project Director to serve as the agency's primary, day-to-day point of contact,** and will oversee the project portfolio. We will assign a dedicated Project Manager for each individual project. All our project managers are certified Project Management Professionals (PMP) by the Project Management Institute (PMI).

We have over 20 public sector consulting project managers / senior project managers on our team, each highly skilled in leading government and other public sector assessments and initiatives. We highlight two within the table below to fulfill this role for NCTCOG and other entities that leverage this contract, depending on the timing and exact needs of each engagement.

Proposed Engagement Team

Below we outline our key proposed team members and each of their roles and responsibilities.

Name / Title	Roles and Responsibility
Susannah Heitger PMP, CCMP, PMO-CP, MPA Principal	**Engagement Principal** • Provide executive leadership oversight and serve as the lead Crowe sponsor for NCTCOG, TXShare and each client entity • Manage relationships with NCTCOG, TXShare, and each client entity • Serve as a point of escalation • Mitigate risks/issues and remove project barriers • Oversee quality assurance and quality control
Mark Maraccini CPA Partner	**Partnership Lead** • Support relationships with NCTCOG, TXShare, and each client entity • Promote this TXShare contract and support governmental entities in obtaining Statements of Work that meet their needs
Jill Willis PMP, CCMP, MBA Managing Director	**Project Director** • Support relationship management with NCTCOG, TXShare, and each client entity • Mitigate risks/issues and remove project barriers • Serve as the primary Crowe point of contact for NCTCOG, TXShare, and client engagements • Manage the team, including allocation of appropriate Crowe resources, including contractors • Provide quality control review over analysis and deliverables
Sharon Nelson PMP, CCMP Manager *Candidate for Project Manager of Individual SOWs*	**Project Manager** (Candidate for Individual SOWs) • Serve as day-to-day point of contact for client engagements • Manage the team, including all Crowe resources and contractors • Develop, execute, and manage project schedules, budgets, assignments, status, and other project management tools • Develop and manage project management tools, including the project charter, schedule, written status reports, status meetings, risk/issue logs, project collaboration site (such as SharePoint), and communications • Plan and manage the project scope, schedule, and budget, including proactive, transparent risk and issue tracking and mitigation • Provide quality control review over analysis and deliverables

Name / Title	Roles and Responsibility
Gen Carter PMP, CSM Manager *Candidate for Project Manager of Individual SOWs*	**Project Manager** (Candidate for Individual SOWs) • Serve as day-to-day point of contact for client engagements • Manage the team, including all Crowe resources and contractors • Develop, execute, and manage project schedules, budgets, assignments, status, and other project management tools • Develop and manage project management tools, including the project charter, schedule, written status reports, status meetings, risk/issue logs, project collaboration site (such as SharePoint), and communications • Plan and manage the project scope, schedule, and budget, including proactive, transparent risk and issue tracking and mitigation Provide quality control review over analysis and deliverables
Glendon Haney Principal	**ERP Subject Matter Specialist** • Provide subject matter expertise for ERP including but not limited to technology strategy, configuration, implementation, integration, customization, scalable operations, resource optimization and risk management • Provide ERP functional expertise including, but not limited to accounts payable, receivable, general ledger, budgeting, financial reporting, fixed assets, and debt management
Hyerine Kim D365 Finance and Operations Functional Consultant Associate Manager	**ERP Subject Matter Specialist** • Provide subject matter expertise for ERP including but not limited to technology strategy, configuration, implementation, integration, customization, scalable operations, resource optimization and risk management • Provide ERP functional expertise including, but not limited to accounts payable, receivable, general ledger, budgeting, financial reporting, fixed assets, and debt management
Sadir Zarook CBAP Manager	**Lead Business Analyst and Finance, Compliance and ERP Subject Matter Specialist** • Serve as a lead business analyst • Provide subject matter expertise on ERP-specific financial and compliance-related topics • Provide ERP functional expertise including, but not limited to accounts payable, receivable, general ledger, budgeting, financial reporting, fixed assets, and debt management
Consultants and Senior Consultants, such as: Oliva Knarr Hans Callanan Casey Koenig Monae Evans	**Business Analysts** (resources allocated per individual SOWs) • Develop tools and execute analysis at the direction of the project manager • Develop draft deliverables • Maintain project documentation library (such as SharePoint) • Assist with project coordination

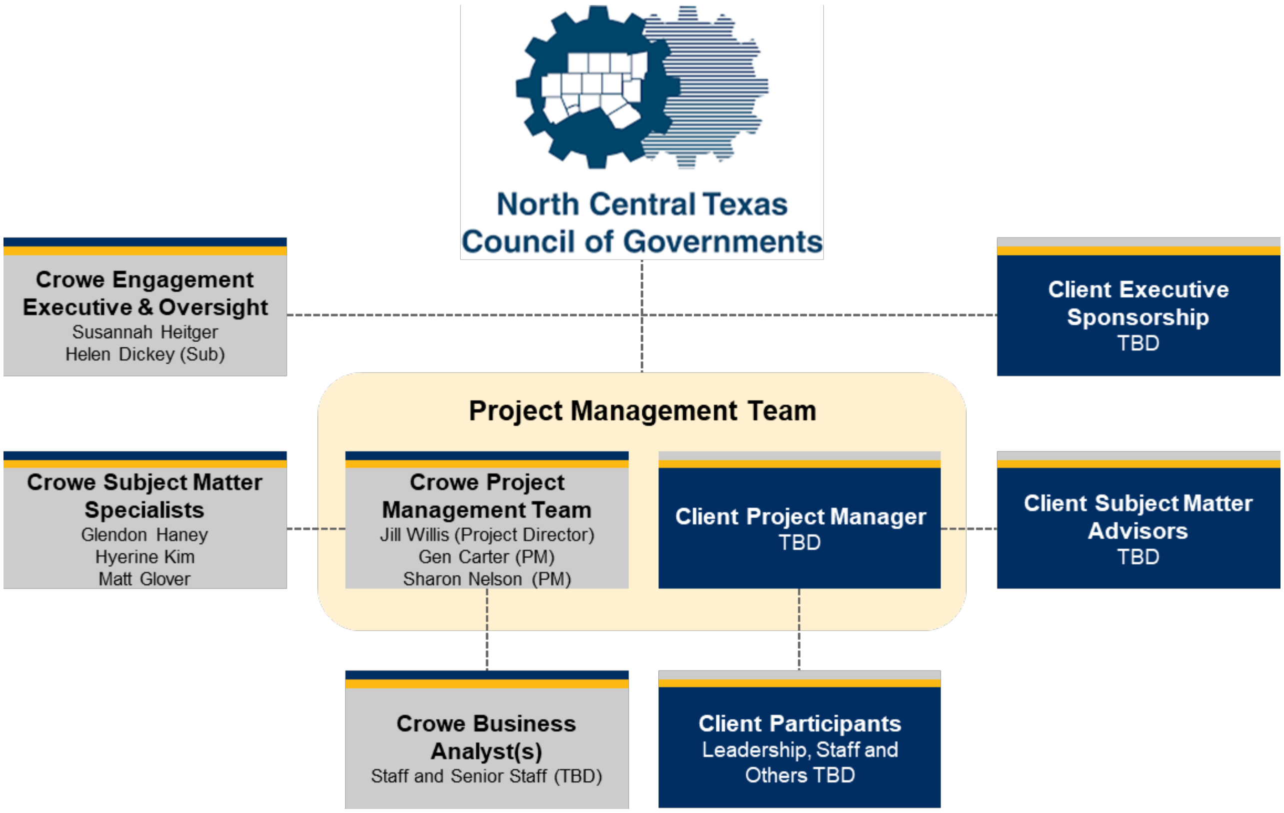
Name / Title	Roles and Responsibility
Helen Dickey Harris & Dickey CPA, CISA Founder & Partner	**Engagement Sub-Contracting Principal** • Provide executive leadership oversight and serve as the lead subcontractor sponsor for NCTCOG, TXShare and each client entity • Assign subcontracting team resources based on project need and in coordination with the Crowe Project Director • Serve as a point of escalation as needed • Mitigate risks/issues and remove project barriers • Oversee quality assurance and quality control
Matt Glover Harris & Dickey	**ERP Subject Matter Specialist** • Provide subject matter expertise for ERP including but not limited to technology strategy, configuration, implementation, integration, customization, scalable operations, resource optimization and risk management

We have provided resumes of the team above in **Appendix A.** The resumes outline education, years of experience, licenses and certifications, professional affiliations, and other relevant experience.

In the next section, we provide an organizational chart illustrating lines of authority and responsibility. As described above, our appointed Project Manager or Senior Project Manager will manage the project scope, schedule, and budget, proactively identifying potential risks, issues, and mitigation plans throughout the project. We will maintain transparent risk and issue logs, which we include on each weekly Status Report for transparency and collaborative troubleshooting.

Organizational Chart

Below is an organizational chart to illustrate how we propose to organize the project team.



Exceptional Client Experience

We assign senior managers and partners to principal areas of the ERP services and align expertise with your organizational structure. Through frequent communication with your organization, we can develop a deep understanding of your needs and expectations – and can respond appropriately.

We assign a single contact point to oversee consistency in the services provided and to manage information received from multiple teams in a cohesive manner. This streamlines communications and provides you with a single source of accountability when questions arise. Ultimately, we want to effectively work together to achieve results. Our goal is open, timely communication and swift issue resolution. Routine phone calls, emails, faxes, and report preparation and delivery are considered part of our service and are provided at no additional cost to you.

Staff Continuity

In assigning staff to engagements, we place high importance on maintaining continuity of staff from one year to the next. This is important from a client service as well as an engagement efficiency perspective. Naturally, at times it does become necessary to replace a member of the engagement team with someone of comparable skills and experience.

References

Quality work based on strong functional competency and deep expertise is the core element of creating value for our clients. Quality service involves prompt and efficient service delivery and effective communication with clients.

Crowe has delivered value to our clients for more than 80 years by listening to their needs and developing a comprehensive understanding of their businesses and would appreciate the opportunity to do the same for you.

We invite NCTCOG to speak to our clients who can attest to our high-quality work, knowledge of the public sector, and exceptional client experience. Listed below are four clients for whom we have delivered relevant services within the last five years. Please note that the first three references are for Crowe and the final reference is for Harris & Dickey.

Client: City of Huber Heights, Ohio	
Project Name	ERP Assessment, Future State Roadmap and Procurement Support
Contact Information	John Russell, City Manager jrussell@hhoh.org | (937) 237-5837

Client: Imperial County, California	
Project Name	ERP Assessment and Procurement Support
Contact Information	Mayra Widmann, Deputy CEO – Budget & Finance Mayra.Widmann@co.imperial.ca.us | (442) 265-1111

Client: Illinois Department of Commerce & Economic Opportunity	
Project Name	Local CURE: CARES Act and ARPA Technical Support & Program Management
Contact Information	Phil Keshen, Chief Financial Officer Philip.keshen@illinois.gov | 312-805-4966

Client: North Texas Food Bank (Harris & Dickey)	
Project Name	Software Optimization and Technology Roadmap
Contact Information	Bill Garza, Chief Financial Officer Bill.Garza@NTFB.org | (956) 414-8660

Project-Related Experience and Qualifications

Why Crowe?

Crowe is a global firm with a commitment to excellence, deep specialization, and timely response. We accomplish this by listening to our clients – about their businesses, trends in their industries, and the challenges they face.

Our team, with over 50 years of combined experience in public sector business and information technology projects, will help avoid and mitigate pitfalls, incorporate lessons learned and best practices, align business process and technology with organizational goals, and drive success. Our Crowe team has delivered successful outcomes on similar projects for dozens of nonprofits and state and local governments across the country, focusing on core services that include:

ERP Readiness and Procurement – Enterprise technology projects are most successful when an organization has planned, prepared, and assessed current technology. We use our understanding of government administration and enterprise technology to assess current state and set goals for future functionality. Our team will facilitate requirements development for functional and technical system capabilities and guide your organization through the solicitation process for new enterprise technology.

Planning and Assessments – Process improvement and IT projects must first be aligned to organizational strategy and resource constraints as well as operational needs. We use our extensive planning experience to clearly define scope and outline an approach that drives towards achievable results within your operating parameters, providing a strong foundation for ongoing success for NCTCOG.

Business Process Analysis and Business Process Re-engineering (BPR) - Crowe possesses unmatched experience in providing functional process improvement services. Our approach focuses on complete end-to-end business process structures and appropriate decomposition, clearly documenting the associated pain points, exception processes, rework, corrections, manual processing, backlogs, issues, and variations due to different mandated requirements. Working directly with you, we leverage our experience to analyze the gap between where you are and where you want to be, collaborating with you to achieve a future state that is aligned with your desired goals and outcomes.

Technical Assessment – Crowe has decades of experience performing technical assessments, and our team has deep experience analyzing technology and determining gap areas. We are passionate about technology and have seen the positive impact that well-functioning enterprise systems can have on our clients and seek to help our clients better utilize technology.

We have a comprehensive understanding of public sector and nonprofit administration, and our team's experiences working with and for the public sector gives us a unique perspective. We have seen a wide variety of processes and policies within nonprofit agencies and can recommend process changes based on our experience and understanding of best practices. Our team has a strong foundation in public sector process and technology and can share that perspective with you as we work together to improve internal processes and policies.

Crowe Overview

Crowe LLP (Crowe) was founded in 1942 and has been in business for over 80 years. Headquartered in Chicago, Illinois, Crowe is a global accounting and consulting firm with more than 6,700 personnel and 37+ U.S. locations across the nation including 5 offices in the State of Texas. [1]
Includes subsidiary offices

6,700+ PROFESSIONALS [1] across **37** U.S. OFFICES

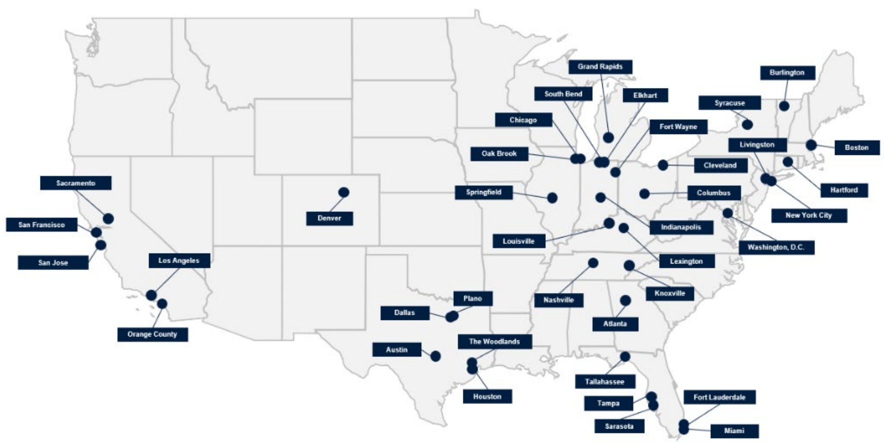
Because we operate within industry specializations as a national practice, we can pull expertise from many parts of the firm to best support your needs. Connecting deep industry and specialized knowledge with innovative technology, our dedicated professionals create value for our clients with integrity and objectivity. Crowe is recognized by many organizations as one of the country's best places to work.

Fortune 100 Best Companies to Work for 2024

Crowe once again is named one of the Fortune 100 Best Companies to Work For in 2024. Crowe is recognized for offering a great workplace and a positive experience for all employees – regardless of job role, race, gender, or any other demographic identifiers. Everyone at Crowe plays a role in fostering and living by a strong, values -based culture. This is Crowe’s fifth appearance on the premiere best workplaces list. The award is based on an analysis of survey responses from more than half a million U.S. employees at Great Place to Work-Certified™ organizations.

Office Locations

Crowe serves clients coast to coast from the following office locations:



Our Purpose Drives Us

At Crowe, our purpose is: Shaping Your Better Tomorrow. Together. Today. It’s the standard we live by and reflects what we hold important as both a firm and as individuals.

SHAPING YOUR BETTER TOMORROW. TOGETHER. TODAY.

We are driven by passion, deep understanding, and integrity. We work together as a team to serve the needs of our people and our communities. We embrace and celebrate collaboration, growth, and learning.

We lead with insights, and we’re committed to always do better and be better. We embrace the legacy of where we’ve been, and our duty to tomorrow.

Our Values

Our values reflect what we hold important as both a firm and as individuals. By living out our values every single day, in every single interaction, we drive the purpose of the firm forward. These values are the fabric that makes up the tapestry of our purpose, and that tapestry is the foundation for all the work we do.

Starting with our core purpose of "Shaping Your Better Tomorrow. Together. Today." our values bring together the guiding principles that all members of the firm, regardless of title or position, are expected to use in their interactions with colleagues, with clients, and in the communities and profession in which we work. It explains to our people the standards and expectations of ethical conduct that Crowe requires when doing business, wherever that might be.

This core purpose and our core values – care, trust, courage, and stewardship – guide us in exercising professional skepticism, objectivity, and being free of conflicts of interest. They guide our people in acting with the utmost integrity and professionalism in each interaction and provide a solid foundation for the firm.

The Power of Crowe means our clients have access to the top expertise across the firm and experience a seamless collaboration between our offices, our business units, our subsidiaries, and our international network in the delivery of that expertise. For our people, it means career growth opportunities and potential for leadership development. Crowe invests in and engages the most effective resources available and goes deeper to find valuable insights and opportunities. At Crowe, our people work together across our functional areas to shape a better tomorrow.

Deep Specialization

Our vision is built on deep specialization and a "One Crowe" approach – a focus on our clients, our people, and the hallmarks of our profession: integrity, objectivity, and independence. By aligning our specialists along industry lines, we bring deeper and broader knowledge to our services.

This industry specialization gives us a better view to understand your business and the unique challenges you face. You can trust us to help you with your market and business challenges because of our proven reputation and track record for credibility among key industry players, including lenders and professional organizations.

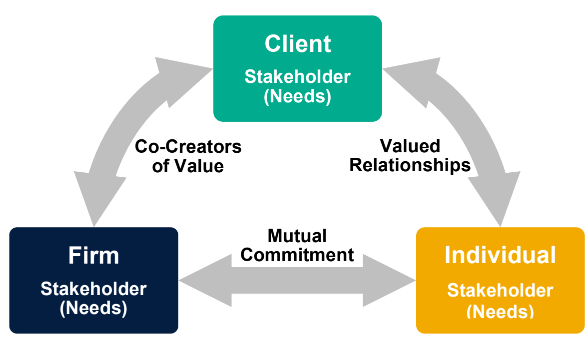
Technology-Driven Solutions

At Crowe, innovation is part of our culture. Our accomplished software development team works in conjunction with our firm's thought leaders and industry specialists to cultivate original, practical solutions that help address our clients' most pressing challenges. Connecting deep industry knowledge with innovative technology, we help clients streamline and effectively manage complex processes.

Our Management Philosophy

WIN³ is the philosophy that Crowe management has chosen as its guide. This philosophy defines the manner in which the firm will function on a daily basis. While there is no universally "right" philosophy, the WIN³ philosophy is seen as the most effective and efficient means to attain our vision of a firm with strong integrity.

The WIN³ management philosophy defines success as having a thorough understanding and being responsive to the needs of the client, the individual, and the firm.



It submits that the best management decisions at all levels will be made when the benefits to all three of these stakeholders are maximized. In the short term, it is expected that one or more stakeholders' needs may take precedence, but over the longer term, success is defined as exceeding the expectations of all three stakeholders in satisfying their needs. Neither the client's, the individual's nor the firm's needs are more important based on their inherent nature. There is no hierarchy among the needs of these three.

Client Experience

At Crowe, our clients are at the heart of everything we do, and we strive to demonstrate exceptional care and service through every step of the client journey.

To help us understand each client's unique needs and value expectations, we listen closely through multiple sources, including a feedback survey that enables clients to evaluate our performance. Through the survey, clients consistently rate us highly for our industry expertise and our exceptional responsiveness, among others. Our aim is to provide an unrivaled experience for our clients, and maintaining their confidence and trust is of utmost importance.

Crowe uses a best-in-class experience management platform to monitor the experiences we deliver to our clients. In the most recent fiscal year*:

<u>Client Experience Resources</u>
If, for any reason, a client is faced with a challenge or issue that is unresolvable with their Crowe partner, we encourage them to contact our Client Experience leader at ClientExperience@crowe.com. The Client Experience leader works with our clients and Crowe leaders to understand and resolve the issue while taking steps to avoid similar situations in the future.

Public Sector Experience Overview

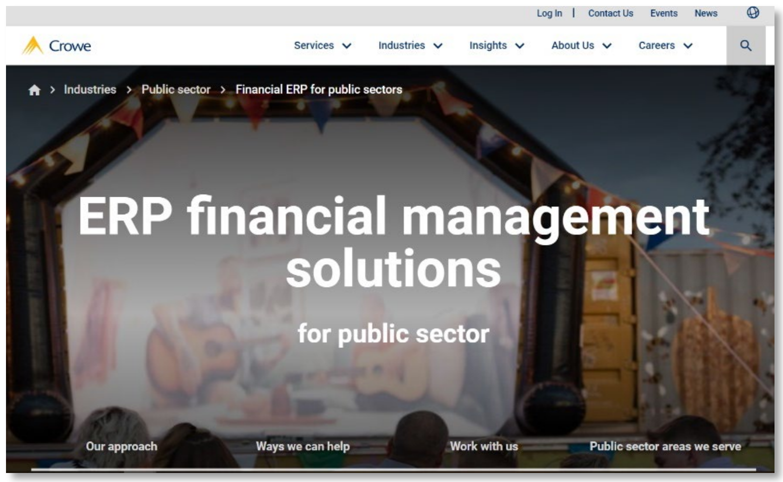
A core tenet of our strategy is to serve clients with deep industry specialization. **This means the team that will serve the North Central Texas Council of Governments is a team of dedicated, committed public sector specialists who understand and have experience with local government-specific operations.**

Crowe has been serving the needs of government organizations for 50 years. We work with many levels of government, including counties, municipalities, utilities, schools, special service districts, state agencies, nonprofits, and quasi-governmental entities. Our team of governmental specialists – many of whom are former elected or appointed officials and government employees – can provide you the thought leadership and technical expertise you need.

In addition, we collaborate with team members across our firm for further specialized knowledge, such as benefits plan administration, and incorporate those resources into our project team of public sector consultants.

Crowe has provided similar process analysis and solicitation support services successfully to hundreds of clients, including Request for Proposal (RFP) development, to public sector entities across the country. Crowe has also worked with a broad spectrum of public sector entities to facilitate technology implementations, with special expertise related to public sector administrative technology like ERP systems. Process assessment and implementation assistance are core to our practice.

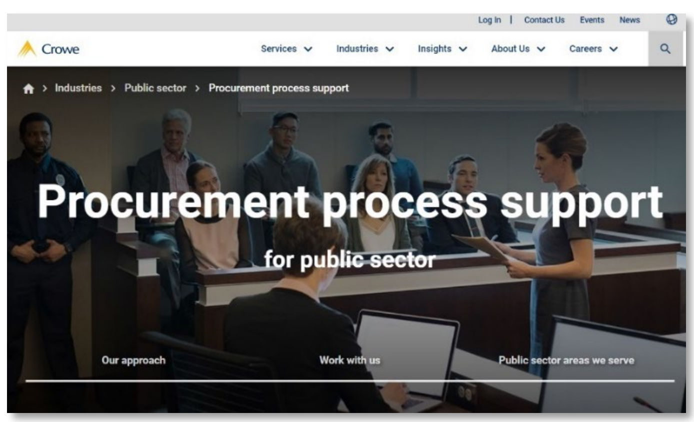
Proven Experience



Crowe is an experienced IT Advisor and ERP implementer with deep subject matter expertise in the business processes, financial processes, and technologies involved with ERP systems. Crowe is a national public accounting, consulting, and technology firm with **over 40 years of experience implementing ERP solutions within a broad variety of public and private sector agencies.** Crowe has advised on many ERP projects in the recent past involving all major ERP systems including SAP, PeopleSoft, Oracle, Lawson, Microsoft Dynamics, NetSuite, Tyler, and others. Additionally, Crowe has implemented many ERP platforms including Microsoft Dynamics, Oracle NetSuite, PeopleSoft, SAP and other legacy products.

Crowe understands the modules of ERP solutions. We are a top Accounting firm with deep Accounting and Finance capability. Our ERP related experience is built on a foundation of being an Accounting firm at our core, with intimate knowledge and understanding of best practices for accounting procedures utilizing ERP platforms.

We bring a highly experienced and diverse team of resources with professional certifications and leverage a wide range of expertise across our firm in areas such as business process analysis, organizational change management, ERP best practices, system integrations, data migration, quality assurance, and training.



Our team maintains information on ERP vendors that serve public and private sectors. Depending on the industry and client needs Crowe guides our clients to focus on those systems most align to their needs.

Crowe has extensive experience conducting Requirements Gathering projects with clients, including Procurement Support and Needs Assessment services for public sector clients. This includes leading the up-front analysis and requirements gathering, developing the RFP, supporting selection, and assisting with contract / statement of work negotiations.

Harris & Dickey Overview

Harris & Dickey, LLC is a boutique certified women-owned management consulting firm focused on providing the right solution and the right time. Our team is composed of business leaders with the sole focus of providing the best solutions and highest level of service for our clients. Our experienced professionals to assist clients with accounting, finance, internal audit and IT audit services. Our goal is to develop long-lasting relationships with our clients built on respect, dedication, and trust. When our clients are successful, we will have performed up to our internal standards.

Project Highlights

We provide several project highlights of our experience supporting other public sector clients with related services.

Client	Project Description
American Academy of Pediatrics (AAP)	**ERP Selection & Implementation:** Crowe assisted the AAP in defining use cases and requirements for a new ERP system. We then facilitated the selection process including leading vendor demos, scoring, and negotiations. Crowe supported AAP by serving as the Project Manager for the implementation and providing vendor management.
YMCA of Greater New York	**CRM Selection Support.** Crowe is working with the YMCA of Greater NYC to manage the development of a comprehensive RFP and a competitive evaluation of a new Customer Relationship Management system. Crowe assessed business and technical requirements, recommended improvements, and built consensus building among sponsors, business leads, and technical subject matter experts to select a system that meets the organizational needs and goals. Crowe is now in a PMO oversight role managing the implementation and providing vendor management.
NYC Battery Park City Authority	**Project Management Software Needs Assessment and Evaluation.** Crowe worked with the Authority to identify business needs, gather requirements, conduct market research and evaluate construction management software to fulfill the Authority's needs.
NYC Battery Park City Authority	**Asset Management Needs Analysis.** Crowe worked with the Authority to identify business needs, gather requirements, conduct market research and evaluate software to enable better management over their lease agreements and corresponding lease invoicing. Crowe worked with the Authority to consolidate all active lease agreements. Crowe performed an extensive exercise to catalogue key terms into an asset inventory tracker. As a result, BPCA had an isolation of the most recent terms and clause across all existing amendments to each contract in preparation for importing to their new software.
California State Controller's Office (SCO)	**California State Payroll System (CSPS) Project Solution and Services.** Crowe has provided project management, business analysis, and organizational change management (OCM) services to SCO for the last six years to support the requirements gathering and procurement phase of the California State Payroll System (CSPS) project. CSPS is a massive project intended to replace SCO's aging Human Resource and Payroll applications with a modern Human Capital Management (HCM) solution. When complete, CSPS will support the HR and payroll needs of some 285,000 employees across 160 state agencies and departments. Crowe's role in the procurement process included current state analysis, future state definition, requirements elicitation, market research and alternatives analysis, and development of solicitation documents. The Crowe team was then asked to support the final stages of solution procurement, including execution of a proof-of-concept phase and evaluation and selection activities.

Client	Project Description
	Crowe was also recently selected to provide OCM and Project Management Office (PMO) support throughout the implementation.
California Department of Developmental Services (DDS)	**Uniform Fiscal System Management (UFSM) and Consumer Electronic Records Management System (CERMS) Project.** Crowe worked with the Department of Developmental Services in coordination with the State of California's Project Approval Lifecycle (PAL) to assess current state business process, develop future state business process, create functional and technical requirements, and ultimately facilitate the selection process for an enterprise solution with both case management and financial management functionality. This system will be used by all 21 Regional Centers throughout the State of California providing services for individuals under the Department of Developmental Services.
CalRecycle	**Integrated Information System (CRIIS) Project.** The CRIIS solution will be an enterprise-wide information system with the functionality and tools to streamline current processes by replacing thirty-one (31) existing program area applications. Many of these existing applications have overlapping and duplicative functions and each comes with its own interface and distinct outputs. The project completed the initial PAL planning phases and is now in the system implementation phase. The Crowe team provided select Project Management Plan development and internal review support during the initial engagement, supporting the submission and CDT approval of the initial plans.
Cook County Clerk of the Circuit Court	**Case Management System Needs Analysis and RFP Development.** Crowe worked with the Clerk of the Circuit Court of Cook County to conduct a needs analysis and define comprehensive requirements for a new Countywide court case management system for all of Cook County's downtown and suburban district courts, including interfaces with several third-party existing systems. This encompassed requirements gathering, a full needs analysis, developing an RFP, and consulting the County through selection of a vendor.
City of Chicago	**Procurement Reform Task Force Procurement Business Process Reengineering** As a subcontractor to Krasan Consulting, Crowe helped lead a team to interview stakeholders from seven agencies to define priorities, document and analyze current state business processes, identify improvement opportunities, and recommend future state business processes as part of the larger Procurement Reform Task Form effort. Developed a strategic roadmap to assist stakeholders in moving from their independent current operations to a more streamlined, transparent, and effective future state. Facilitated stakeholder sessions with representatives of the City of Chicago and six sister agencies: Chicago Housing Authority, Chicago Park District, Chicago Public Schools, Chicago Transit Authority, City Colleges of Chicago, and the Public Building Commission or Chicago.
City of South Bend	**Needs Assessment and RFP Development** Crowe assessed the IT organization, developed a plan for IT and then created an RFP document for the outsourcing of the City's IT function. In doing so, Crowe determined IT and business requirements across all City departments, documented IT services currently provided and those needed, inventoried the current IT architecture, developed vendor evaluation criteria, determined vendor scoring criteria and developed the request for proposal document. Additionally, we evaluated and selected vendors to create a short list of likely qualified vendors, led the bidders' conference, facilitated the evaluation of RFP responses, led vendor oral presentations, led vendor reference checks, created cost comparison analysis models, and facilitated the selection of recommended solution.
Indiana Department of Revenue (IDOR)	**Collections System Selection** Crowe is currently working with the Indiana Deportment of Revenue (DOR) to support selection of a vendor to provide collection services.

Client	Project Description
	DOR engaged Crowe to provide the following services: Conduct market research for best practices in the tax collections; Conduct requirements sessions with DOR leadership and operational units; Document and validate all requirements; Develop comprehensive RFP; Develop evaluation criteria and tools proposal review and vendor selection; Facilitate oral presentations and solutions demonstrations; Support vendor negotiations. To date, the RFP has been published and IDOR is currently evaluating vendors.
City of Huber Heights, OH	**Current State Assessment and ERP Procurement** Crowe is currently working with the City of Huber Heights, OH to support the selection of a vendor and solution to provide enterprise-wide finance, HR, payroll, time entry, utility billing, and tax management services. Crowe is currently providing the following services: assess current state processes, facilitate future state visioning sessions and determine future functionality needs, develop functional and technical requirements, develop RFP documentation and facilitate vendor selection process.
Imperial County, CA	**ERP Solution Procurement Support** Crowe is engaged with the County to provide support in procuring a new Enterprise Resource Planning (ERP) solution. Specific activities include a comprehensive assessment of the current technology environment, assessment of industry trends and completion of market research based on information learned in the assessment, detailed system requirements and solicitation document development, and oversight of procurement process from development and release of the RFP to proposal evaluation, vendor demonstrations, and vendor selection.
District of Columbia Courts	**FP Preparation and System Selection for new CMS. D.C. Courts – Trial Court CMS Requirements Validation, RFP Development, and Selection Support Services** Crowe supported DC Courts in validating requirements, developing a comprehensive RFP, and advising the Source Selection Evaluation Board (SSEB) during the Courts' selection of a trial court CMS. Crowe worked with the Courts' stakeholders to validate existing requirements, identify and fill gaps in requirements, and develop a comprehensive RFP with functional, technical, and implementation requirements. In addition, we supported the SSEB by analyzing vendors' requirements responses, reviewing proposals for adherence to the needs stated in the RFP, and supporting the SSEB in its system selection process.
Lake County (Illinois) 911 Regional Consolidation Consortium	**Requirements, RFP Development Selection Assistance, Contract Negotiation** Crowe is currently serving the Consortium, which comprises 50+ Public Safety Entities replacing numerous systems, seeking to purchase and operate together as a Consortium. Crowe developed comprehensive requirements for multiple systems (CAD, Mobile Data, LE RMS, Fire RMS, and JMS), then developed an RFP, led all selection activities including pre-bid conferences and addenda, and facilitated vendor demonstrations and the system selection. Crowe is currently serving as the Consortium's project manager to support implementation of the software that went live in 2024.
Lake County (Illinois) County Administrator's Office	**Integrated Justice System Case Management RFP Development** Crowe worked with Lake County, Illinois to lead an assessment of existing integrated justice CMS requirements to provide feedback, input, and develop an improved RFP with new detailed requirements to meet the needs of all justice stakeholders. Crowe also developed total cost of ownership estimates for the new IT system(s) in various scenarios. Crowe facilitated discussion among stakeholders from multiple elected officials and county administrators. The RFP was released, and vendors submitted proposals.

Client	Project Description
Lake County (Illinois) Clerk's Office	**Records Management System Procurement & Implementation Support** Crowe worked with the County to provide procurement support as they selected a new cloud-based records management system for the Clerk's Office, including land records and vitals (e.g., birth/death records). Currently, our team serves as the County's Project Management team for the multi-phased implementation.
Health & Hospital Corporation of Marion County	**Vital Records EDM** Crowe worked with HHC to define requirements, write an RFP and assist with the implementation of an Electronic Document Management System (EDMS) within their Vital Records Department. Crowe assisted HHC with this project by performing the following activities: Defined the requirements of the Electronic Document Management System; Identified existing EDMS software that may satisfy the requirements; Developed a Request For Proposal; Facilitated vendor demonstrations; Assisted with determination of which vendor and software packages best meet the requirements; Entered into agreements or contracts for rights to the software; Determined the resources necessary to implement the software; Entered into agreements or contracts with third party implementers necessary for successful implementation.
City of Aurora, Illinois	**Procurement / Program Management Office Projects** Crowe has worked and is currently working with the City of Aurora, the second largest city in Illinois, to serve as the PMO on the implementation of several initiatives to achieve efficiencies. Below are highlights of our experience on various projects we lead for the City in a project management role: • PMO for Implementation of Public Safety Systems (CAD, RMS, Mobile) • PMO for ERP and Public Needs Assessment • PMO for Granicus Legislative Management Suite implementation • PM for Everbridge Emergency Notification System implementation • PM for UKG Timekeeping and Attendance System implementation • PM for UKG-HRIS human resource information system implementation and BenTek online benefits enrollment implementation • PM for City Clerk Record Management Analysis and System Selection • PM for 311 Assessment and System Selection, Implementation • Open Data Strategy and Policy

Technical Proposal

We propose to deliver services leveraging our unique combination of public sector specialization, proven procurement and implementation support services, and ERP specialists across our firm. We will use a **highly customizable, client-centered approach** that we tailor to each agency's objectives, while grounding ourselves in principles of **proactive project management, exceptional client experience, and our methodologies**.

We provide details on how our team can serve members and prospective clients for the following categories:

Product Category	Yes / No
#1	No
#2	Yes
#3	Yes
#4	Yes
#5	Yes

Product Category #1:

Provide ERP Consultancy Services to maintain/repair/modify existing TXShare Entity's or NCTCOG's ERP infrastructure through a contract on the TXShare Cooperative Purchasing Program.

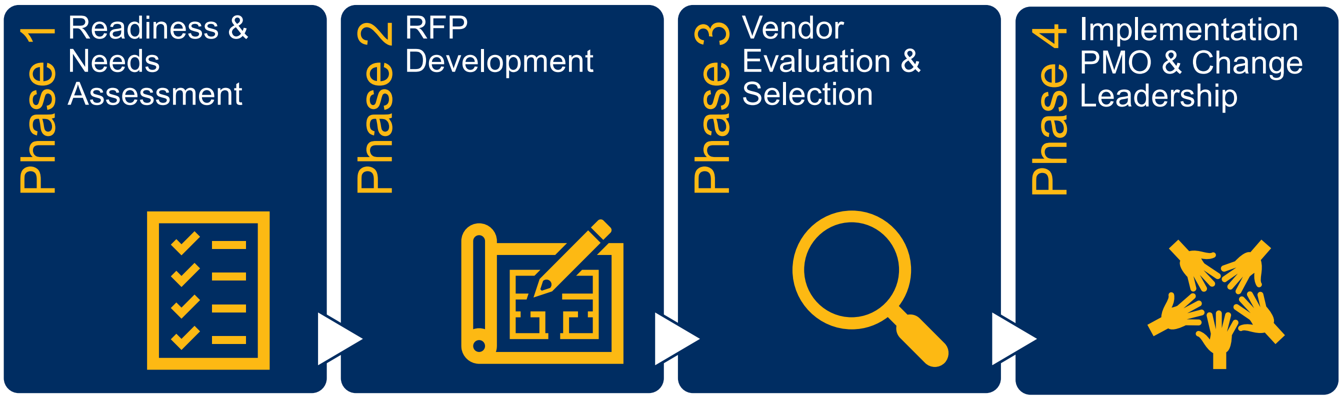
Not applicable, the Crowe team is not responding to Product Category #1.

Product Category #2 and #3:

Provide ERP Consultancy Services to assist NCTCOG or TXShare Entity's research and preparation for ERP implementation, and/or to implement or replace an ERP system through a contract on the TXShare Cooperative Purchasing Program.

The pace of change of technology requires a support partner who understands the business of public sector and how technology enables your people. Our team can support member/client organizations wherever they are with their ERP journey.

For most of our engagements, we propose a multi-phased approach, which is guided by our engagement methodologies developed from best practices and enhanced with lessons learned from our years of experience. We provide an example below, including phase summaries, followed by more details on our approach.



Phase I – Readiness and Needs Assessment

In this phase, Crowe will meet with your project management team to confirm the scope, goals, and objectives of the engagement as well as confirm the project management approach. These will be documented in a formal project management plan. This is an important step to help align all project stakeholders on the project goals, objectives, and approach. We will refine and detail the project work plan presented in this proposal, including task deliverables, resources, and schedules. This is critical to manage expectations on project scope and timing and allow monitoring of the planned-to-actual project progress. At this early phase of the project, it is important to identify sources of existing documentation and analyses to understand the current state environment. Throughout the project, Crowe will work closely with the Project Manager to report progress, communicate project needs, and address potential risks.

Phase II – Request for Proposal (“RFP”) Development

During this phase, Crowe collaborates with the project team to define, develop, and baseline the ERP solution requirements. Crowe will facilitate workshops with SMEs to create a Future State Inventory that will identify the main business capabilities and sub-capabilities. Crowe will prepare baseline requirements based on industry knowledge and institutional knowledge gained through the “as-is” and “to-be” process analysis. Our team will then provide guidance on solicitation strategy, solicitation document content and format, and support prospective client purchasing teams in preparing the solicitation packets.

Phase III – Vendor Evaluation and Selection

Crowe will provide solicitation support for vendor demonstrations by assisting your team with development of materials, facilitation of demos, and reporting of results. Further, Crowe will work with your team and vendors to solicit, evaluate, and report on final proposals. While Crowe will not be involved directly in evaluation and scoring, these deliverables are intended to provide evaluators with information and analysis needed for scoring and comparison.

Phase IV – Implementation Project Management and Change Leadership Services

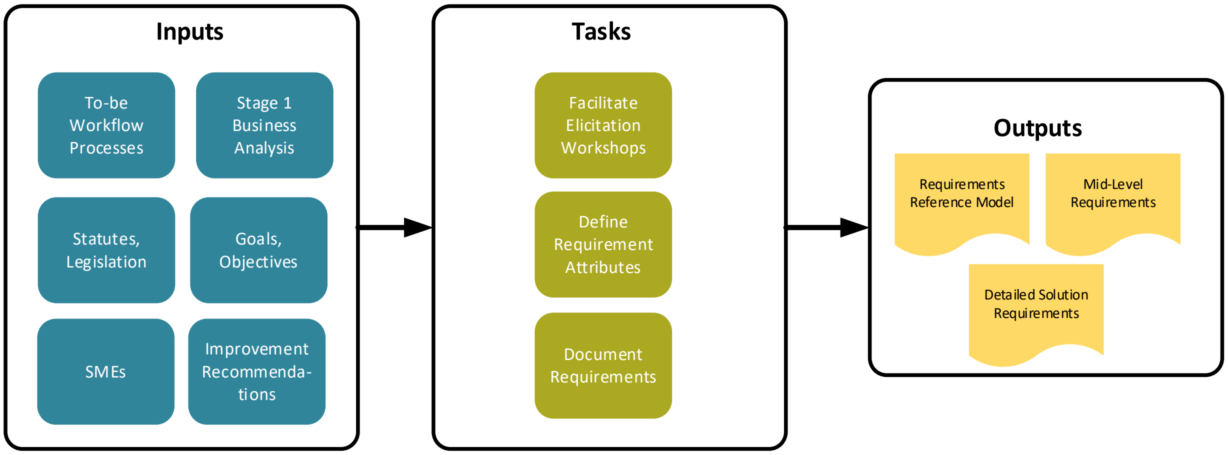
Once the ERP vendor is contracted, Crowe will provide implementation project management and change leadership services during Phase IV of the project. We propose a highly collaborative process that combines your organization’s chosen vendor’s preferred implementation model with Crowe’s recommended implementation approach. We will work with the chosen vendor to develop a detailed project plan and timeline that combines their technical approach needs with the business needs of your organization and many stakeholders.

Phases II and III of our proposed project methodology includes the development of a Request for Proposals (RFP) document and the facilitation of a procurement process to select enterprise software.

Requirements Development

Phase II will include the development of requirements in preparation for the main procurement. We will create an initial draft of functional requirements based on current state discussions and provide them in draft form to small working groups for working session review.

The diagram below provides an overview to Crowe's approach to requirements elicitation.



Inputs that were used to develop "as-is" and "to-be" inform requirements. Additionally, outputs from the business analysis (findings, recommendations and workflows) also inform the requirements. Crowe facilitates working sessions with SMEs to elicit the requirements. There are three types of requirements to consider:

a. **Functional Requirements** – These requirements typically define the functionality a solution needs to support in order to meet business needs. These requirements should identify "what" is required to meet the business objective, not the "how" the requirement is implemented.
b. **Non-Functional Requirements** – These are requirements that describe environmental conditions or productive qualities of the solution. These requirements can include but are not limited to capacity, speed, security, privacy, availability, response time, throughput, usability, etc.
c. **Project/Transition Requirements** – These requirements describe the requirements needed to implement the solution or maintain it in operations and often relate to vendor services such as project management, implementation, development, testing, training, data conversion, operations, etc.

Activities include:

- Confirm participants and stakeholders
- Confirm deliverable content and format through a Deliverable Expectation Document (DED)
- Develop initial draft requirements
- Develop Requirements Management Plan for maintenance of requirements throughout the project
  Final requirements will include:
  - List of functions with prioritization
  - Reporting objectives and business intelligence (BI) capabilities
  - Existing software and hardware
  - Data migration requirements
  - Possible interfaces / integration requirements
  - Security requirements
  - Project approach and timeline requirements
  - Experience and references
  - Project pricing, including software and implementation costs

In Phase III, Crowe will provide solicitation support for vendor demonstrations and work with member/client to complete the procurement of a new software product. Below, we've outlined the tasks and outputs for Phase III.

Solicitation Development

When preparing solicitation documents to find the best product solution, having a comprehensive work plan and effective work session facilitation methods that directly involve stakeholders throughout the entire process is critical. The key component to our approach is the involvement of key stakeholders who are equipped with the knowledge and experience to provide input to, and refinement of, the proposal language. These key stakeholders serve as a "reality check" to our approach and provide valuable insight into the issues that can either positively or negatively impact the solicitation success. The key stakeholder's responsibilities include:

- Provide substantive input and comments on language contained in the Request for Proposal (RFP) sections
- Ensure the proposed solution aligns with the client's technology standards
- Participate in the vendor evaluation and selection process
- Serve as project communication liaisons with their respective work groups.

Solicitation documents typically include bidding instructions, administrative requirements, bid requirements, cost methodology and cost worksheets, proposal/bid format, submission requirements, evaluation methodology, protest processes, solution requirements demonstration, informational attachments, statement of work, etc. Crowe will facilitate planning sessions with these key stakeholders to define the solicitation document(s) format and content. Through these facilitated planning sessions, Crowe and the client will verify that the solicitation document is well-understood by stakeholders and is sufficiently comprehensive for solution vendors to provide accurate and detailed responses and costing.

Next, Crowe will prepare a baseline solicitation document template and facilitate working sessions to develop the solicitation document. These working sessions will encourage direct participation of resources to develop and refine the language contained in the solicitation document. These sessions may involve different stakeholders depending on the subject area, and we encourage substantive discussion on the solicitation language. Throughout these working sessions, Crowe will update the draft solicitation and provide it for stakeholder review and comment. When the working sessions are complete, Crowe will prepare a Final Draft for Client review. Feedback from that review will then be incorporated into the Final solicitation document.

Market Research

We will perform market research and establish a vendor list for RFP distribution. We will work with the client/member team to reach potential vendors.

During the period from solicitation release to contract award, Crowe assists clients with a number of support activities. Solicitation support services are intended to provide a smooth flow of work while ensuring that the Member/client has the information it needs to make informed decisions about products and services from the vendor community. Crowe does not typically play a direct role in evaluation and scoring, as these decisions belong to the Member/client.

This section describes our methodology for the following solicitation support services:

- Solicitation Management Support
- Vendor Demonstration Support
- Solicitation Analysis Support

Solicitation Management Support

Publishing the solicitation is the responsibility of the Member/client, but Crowe can assist in several activities prior to and during the solicitation process. Crowe has relationships with many of the software and service providers that are likely interested in the Member/client's project, and if needed we can advise the vendor community that the Member/client's solicitation is on the market. The intent is to provide the Member/client with the highest number of qualified proposals as possible.

Once the solicitation has been released, vendors will likely submit written questions. Where necessary, Crowe can assist with developing responses to those questions and can facilitate the bidder's conference that is often a part of the solicitation process. Crowe can then capture the minutes from the conference and once approved, send them to the vendors who participated.

Another task where Crowe can assist is to create solicitation scoresheets for evaluators to score their proposal reviews. In addition to simplifying the review process for evaluators, scoresheets allow for comparison of scores between members of the evaluation team. These scoresheets cover each scored proposal component, including 'pass/fail' administrative requirements, functional and technical scores, and cost evaluations.

At any point during the solicitation, the Member/client may need to develop and publish amendments or addenda to the solicitation. These typically include items such as adjustments to proposal due dates, written responses to vendor questions, clarification of functional requirements, and other items. Crowe can advise the Member/client on development of these amendments as needed.

Vendor Demonstration Support

Crowe staff will develop detailed demonstration (demo) scripts for each vendor invited to participate in this phase of the solicitation. While demonstration scripts are based on requirements and business process decisions, the demonstrations will also allow time to discuss implementation. Experience has shown that it is critical for vendors to explain how the software will be implemented along with the software's features. This part of the demonstration is geared towards understanding how the system will be configured and implemented to meet the needs of the organization.

Fairness and objectivity are two important goals of any public sector procurement, so it is critical that agendas and scripts be prepared in advance, and that the demonstrations are conducted in a firm timeframe. To facilitate this, Crowe can schedule vendor demonstrations, create agendas and scripts that are sent to the vendors in advance, facilitate the demos to ensure equal time on equal topics, and finally prepare and distribute minutes and notes from the demos.

Finally, Crowe can prepare demonstration scoresheets for evaluators to use in assessing demonstrations. These tools provide an objective avenue for rating demonstrations against the scripts, but also provide a means for comparison and discussion. Demonstration scoresheets in turn, become a vital part of the overall evaluation process.

Solicitation Analysis Support

Review and assessment of responses first focuses on clarifying unresolved issues before the Member/client prepares its final scoring. During this step, any remaining issues with software functionality, implementation approach, data conversion, or scope are clarified, and vendors are asked to make any necessary revisions to their proposal. In this step, we can assist with final Q&A and additional discussions with vendors.

Once proposals are received and if desired, Crowe can also conduct an independent review and assessment of final vendor proposals. This task would not be a scoring or evaluation exercise, but instead would provide insights to evaluators on strengths and weaknesses of each proposal. This can be a valuable tool for evaluators who may not possess the experience needed to review certain sections of each proposal (e.g. a functional expert reviewing a technical security response). It can also provide input to any vendor interviews or follow up questioning that the Member/client may want to conduct.

Vendor Demonstration Selection, Vendor Reference Checks, and Vendor Demonstrations

We will provide demonstration support for those short-listed vendors and facilitate demonstrations with the member/client evaluation team. We will work in coordination with your team to develop demonstration scripts and communicate expectations with vendors. We will also assist in the member/client team's selection of a final vendor.

Crowe will not make a final vendor selection decision or a recommendation. It is important that the member/client make its own selection decision based on the data and assistance that Crowe provides. Our role is to provide facilitation assistance and guide through a decision-making process to help the member/client be confident in whatever decision it makes.

Product Category #4:

Provide Standalone Review and Documentation Services of TXShare Entity's current business processes, process flows, process integration, and identification of pain points prior to their ERP implementation through a contract on the TXShare Cooperative Purchasing Program.

Phase I of our proposed project approach includes an assessment of current state business process in preparation for a new enterprise system. In our view it is critical to assess current state and identify areas for future improvement prior to embarking on any enterprise technology procurement process. Our team will provide the following activities:

Readiness Assessment

We will identify and collect artifacts and review internal policies and procedures to develop a short readiness assessment with initial observations about member/client organizational readiness and areas to assess further. This document will list all business process areas for analysis during the Current State Gap Analysis.

Current State Working Groups and Workflow Development

We will work with staff functional subject matter experts to develop current state workflows and notate any current pain points with the existing policies and procedures. As we document the baseline systems and processes, we will identify other standalone applications that must integrate with core ERP functionality.

We will engage staff with several guiding questions, including:

- Who are the resources responsible for certain activities?
- What are the systems and technologies currently in use that support processes?
- What are the "pain points" or bottlenecks staff currently experience?
- What activities are redundant?
- Where can we look for improvements? Automation? Reduction of paper/manual process?

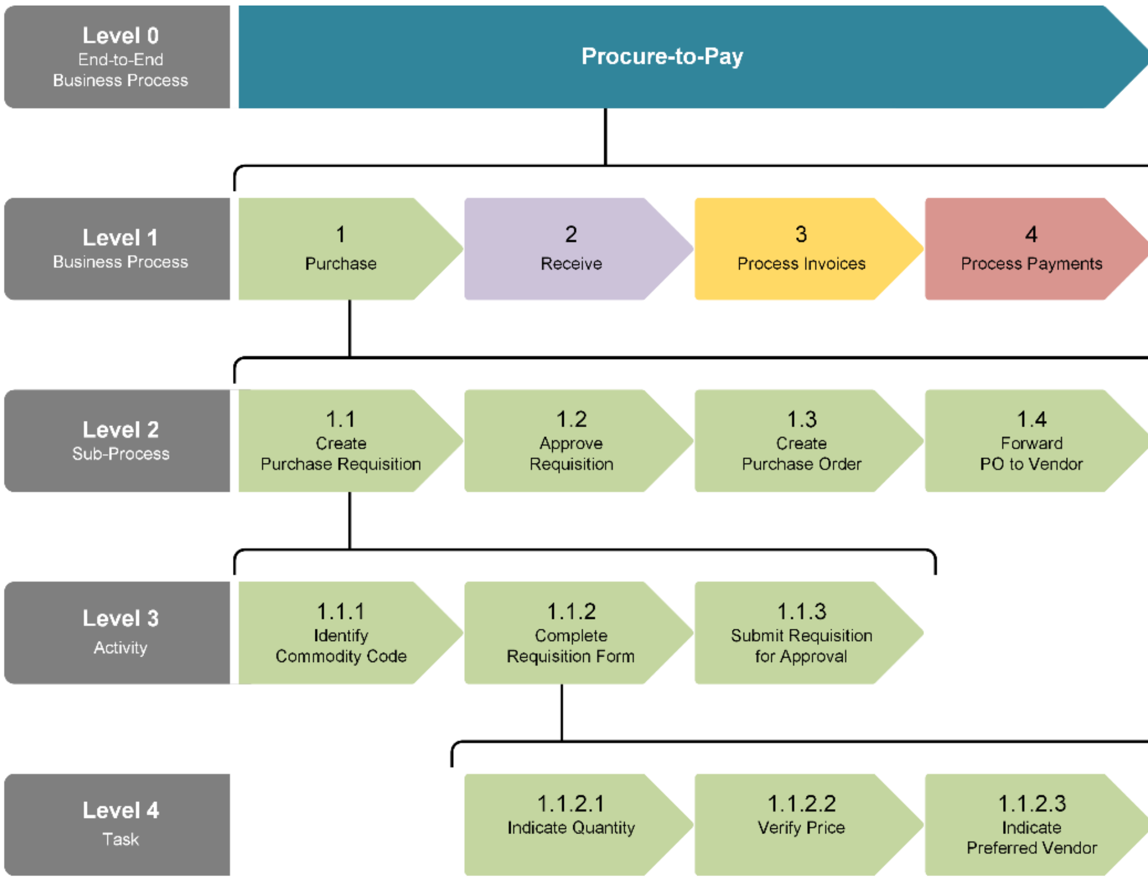
Crowe's approach to Business Analysis incorporates the following steps:

<u>Step 1: Develop the Business Process Inventory</u>

A key lesson learned from other Business Process Re-engineering (BPR) projects is the critical importance of establishing the proper process definitions and structure. The organization of business processes will be especially important for two reasons: (1) determine which processes are in-scope for the Project; and (2) ensure the entire end-to-end processes are captured.

It is important to keep in mind that not all business processes may need to be documented at the same decomposition level. To help make these determinations, Crowe uses Levels of Decomposition, which range from End-to-End business processes to more granular Activities and Tasks. These levels are presented in the diagram below, which uses the example of a "Procure-to-Pay" business process and breaks it down into levels.

Levels of Decomposition Diagram



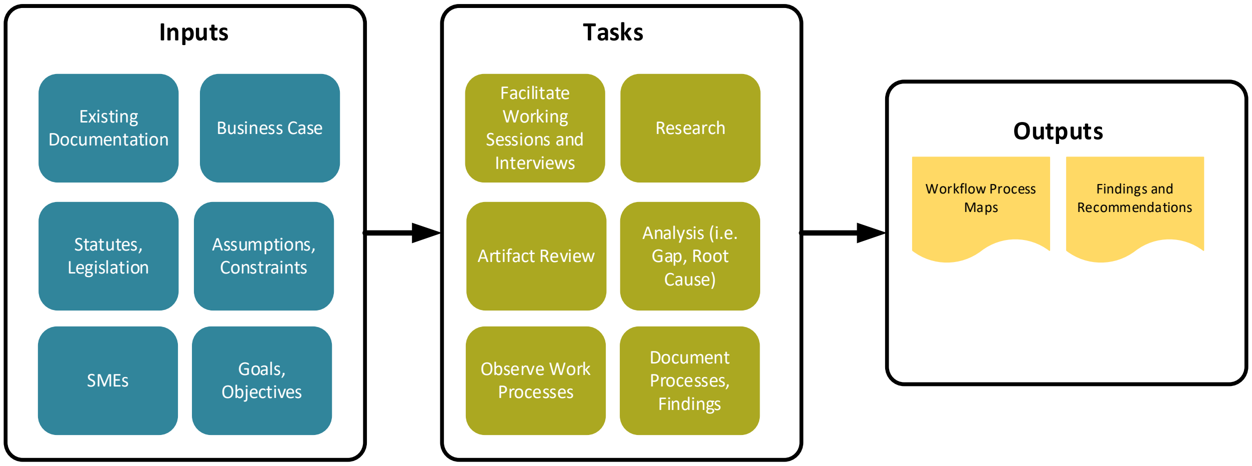
<u>Step 2: Document Business Process Workflows</u>

A business process consists of the following components: inputs, activities or tasks and outputs. Workflows describe the activities, procedures, organizations or resources involved, the inputs, outputs and tools for each activity in a business process.

The diagram below provides an overview of Crowe's own business process for developing workflows. Our effort consists of various inputs (existing documentation, artifacts, input from Subject Matter Experts (SMEs)), tasks (working sessions, research and analysis, etc.) and outputs (process maps, findings and recommendations). During the initial phase Crowe will work with the member/client to identify the tactical approach selecting the appropriate inputs and analysis tasks to create the required output deliverables in the timeframe needed. Crowe will apply this process for both the "as-is" and "to-be" business process analysis.

Workflow components typically contain: Descriptions, Goals, Metrics, Roles, Tasks, and Key Data

Crowe's Approach to Business Process Analysis



Current State Gap Analysis

We will develop an assessment of current business processes and identify pain points for staff in the current state. This document will include current state workflows and narratives, current process pain points and documented areas for improvement, and an analysis of gap areas to be addressed in the future state. This will include initial recommendations for future ERP solution functionality. These findings will be used directly in the development of future system requirements in Phase II.

Product Category #5:

Provide ERP Consultancy Services otherwise not anticipated in this RFP.

In our experience, what is clear is that ERP:

Implementations are ~~**unruly**~~

Implementations are ~~**disruptive**~~

Implementations are ~~**endless**~~

Implementations are **game-changing**

ERP projects are time and resource intensive, and it is important to remain nimble throughout the process and address project issues head-on. Our team will work with you to prepare member/client organizations for impending change and work through concerns from staff and stakeholders.

The following diagram illustrates our project management office (PMO) support methodology.

We leverage some or all these elements during our technology and assessment engagements and are also able to provide flexible, ongoing support through our **Crowe Government Guide**. The Crowe Government Guide provides flexible, customized support, and it includes access to a team of on-demand specialists with the ability to connect via one-on-one calls or chats when needed.

Organizational Operation

1. *Description of the Proposer's process for responding to an order for product.*

Crowe assigns a Project Director to serve as the main point of contact for NCTCOG and its members. Once a service request is received, the Project Director under direction by our Engagement Partner, will lead the process to develop an appropriate scope of work and submit for the member/client's review. If awarded, the Project Director will coordinate with the member/client to finalize a professional services agreement and formally initiate the project.

2. *Description of the Proposer's process for delivering orders to respective clients.* (See below)

3. *Description of the Proposer's customer satisfaction services, to include any warranty and/or repair capabilities.*

The following section is in response to both questions 2 and 3 noted above.

We are passionate about providing customer service excellence. One of the critical success factors for ERP selection and integration projects is strong management and oversight. Our team brings rigorous project management expertise, real-world experience, and toolkits to our work. Each of our proposed team member possess a project management certification (PMP, PMO-CP, or CAPM), or an organizational change management certification (CCMP, OCMP). Crowe has decades of experience successfully managing public sector initiatives and balancing conflicting priorities to deliver on time and on budget. Our project management methodology will be used to guide the project, keeping it on time and on budget while executing all project activities and tasks in a timely fashion.

Crowe understands that participation from various entities and individuals is required for member/client to deliver on this project. Keeping all parties aligned to deliver on a common goal is critical. Therefore, communication and alignment are key components of our approach, as outlined below.

Aligned on Purpose	Aligned on Organization	Aligned on Methodology	Aligned on Timing
Crowe works with clients to define and regularly communicate the purpose of the initiative. Keeping the team focused and aligned on the scope of what needs to be delivered, and what requires daily attention is critical to an initiative's success.	Crowe works with clients to define and regularly communicate the structure and organization of the initiative. Ownership, accountability and communication are essential in eliminating confusion and delay in resolving issues.	Crowe works with clients to define and communicate the overall methodology for the initiative, which makes it easier for teams to communicate with each other, identify dependencies and determine appropriate delivery dates.	Crowe works with clients to establish and manage a high-level integrated master plan with key delivery dates. The team must be able to easily understand current status, identify potential problems early and be able to make the necessary adjustments to deliver successfully.

Crowe will work collaboratively with member/client and other stakeholder agencies to develop and coordinate all plans, activities, timelines, milestones, deliverables, and provide communication to all parties. This collaboration will allow us to leverage the unique expertise that exists within your organization, develop greater buy-in from all stakeholders, and make it easier to integrate the final solution into your organization once the initiative is complete.

To deliver as planned, the appropriate disciplines, structure, tools, and communication need to be in place to manage and align all work efforts. Crowe uses a standard methodology aligned with the Project Management Institute's (PMI) Project Management Body of Knowledge (PMBOK®).

Crowe's project management methodology is broken down into five (5) stages. The following table outlines the key activities and tasks in each stage of our project management approach.

Project Management Tasks

Phase Objective	Project Management Tasks
Initiate Get organized	***Define and agree on scope, goals, and structure of the project. Organize stakeholders and establish roles.*** **Establish:** • Project scope, goals, and key milestones • Risks, issues, and plan to mitigatethem • Budget and resource allocation • Stakeholders, organizational structure, and roles • Project Charter • Communication Plan and templates • Kickoff
Plan Get the details right	***Establish tools, processes, and standards getting all the details and timing right.*** **Establish:** • Processes, tools, and standards • Detailed Project Management Plan with all Workstreams • Detailed Timeline • Success Metrics and KPIs • Control quality and approve deliverables

Phase Objective	Project Management Tasks
Execute Deliver on plan	***Keep all workstreams within the project aligned and on plan with skillful project management.*** **Proactively deliver & manage:** • Project tasks and schedule • Guidance and subject matter expertise • Milestones and deliverables • Communication & change management • Scope • Budget and resources • Quality assurance • Corrective actions • Reporting processes
Monitor & Control Stay on track	***Run project effectively through active monitoring and intentional necessary tuning to keep on track.*** **Measure & correct:** • Quality • Risk and issues • Scope changes • Schedule • Approval processes • Performance • Timeline / Schedule • Change resistance • Stakeholder adoption & buy-in
Close Wrap-up	***Wrap up. Measure progress and learn for the future*** **Finalize:** • Perform quality reviews • Deliver all milestones and deliverables • Close and report final budget • Provide administrative and contractual closure • Measure progress and goal attainment • Team lessons learned • Deliver final project documentation • Deliverable signoff • Performance reviews • Final presentations • Plan next steps and future phases • Measure progress, goal attainment, final metrics

Project Tracking and Reporting

We will use a SharePoint-based solution for your organization and Crowe to track the status and due dates of open project tasks or issues. This tool allows for customized views that can be used by both your and Crowe teams, and for summarized or more detailed reporting for various stakeholder groups.

Proposed Approach to Achieving Deliverables

Crowe leverages a phased approach to delivering our professional services. To assist member/client in making an informed decision to proceed or not proceed at the conclusion of each phase, we have planned for discreet “go/no-go” phase gates to evaluate the results of each phase and determine if the project should continue to move forward.

It is important to recognize a technology solution alone will not achieve the desired business performance goals without key business process transformations. The future state definition will require project sponsor and executive management support and buy-in. This project will need active involvement of executives who are responsible for removing barriers and obtaining any required external stakeholder/agency support. It will also require the involvement of Subject Matter Specialists who are open-minded to change and willing to participate in exploring transformational ways of doing business.

We pride ourselves in meeting and exceeding client expectations, including delivering high-quality products and services on time and within budget. Crowe has developed a multi-step approach to ensure the successful completion of deliverables.

Our thorough approach to the review and acceptance of each deliverable includes:

- **Deliverable Expectation Documents** (DED): Before significant work begins on a deliverable, a Deliverable Expectation Document (DED) will be developed by Crowe and approved by the member/client. The member/client will have five (5) working days, or a mutually agreed upon time frame, to review and approve or reject the DED. The approved DED will be signed as an agreement of what will be provided with each deliverable. The DED will summarize the key content of the deliverable, including due date(s), completion and acceptance criteria, and the amount of time for allotted for the member/client review of the deliverable. If the DED is rejected, Crowe will address the rejection comments and resubmit the DED within five (5) working days, or a mutually agreed upon time frame. Upon Crowe's resubmission of the DED, the member/client may only comment or request revisions to changes that were made since the prior submission.
- **Deliverable Development**: We believe ongoing communication throughout the development phase helps align the deliverable with expectations and overall project objectives. Throughout the development process, we will work with the project team and designated stakeholders to solicit feedback for the drafted deliverables, as necessary. Prior to the submission of a deliverable, we apply a multi-level review process to confirm that it will meet your expectations and requirements.
- **Review and Feedback**: the member/client will be responsible for reviewing and approving each deliverable per the designated resources identified in the DED. The member/client will have five (5) working days, or a mutually agreed upon timeframe, following Crowe's submission of the deliverable to review the deliverable and provide feedback. If the deliverable is accepted, the Deliverable Acceptance Document (DAD) will be signed by the appropriate the member/client and Crowe representatives and a copy will be returned to Crowe.

  If the member/client has comments and/or revisions to a deliverable, the member/client will provide such consolidated comments and edits electronically into the draft deliverable. The member/client will be responsible to resolve any conflicts of consolidated comments and/or edits prior to providing to Crowe. The comments and/or revision entries should allow Crowe to determine the reasoning for the comment or revision. The member/client comments and revisions will be categorized and defined as follows:

  - **Priority 1:** Important concept, process, or other content missing or inadequately defined.
  - **Priority 2:** Concept, process, or other content not complete or is unclear.
  - **Priority 3:** Minor editing or presentation issue.

  The member/client may reject a deliverable with comments and/or revisions defined as Priority 1 and Priority 2. Those comments and/or revisions defined as Priority 3 will not result in rejection of a deliverable but will be addressed by Crowe within forty-five (45) days from deliverable approval.
- **Deliverable Revisions**: If there are comments or revisions to the deliverable, Crowe will have five (5) working days, or a mutually agreed upon timeframe, to review, address, and revise the deliverable, as applicable. Crowe will resubmit the deliverable within five (working days) or another mutually agreed upon timeframe. The member/client may only comment on or request revisions to changes that were made since the prior submission, or on areas that were directly impacted by changes made. All other items that did not receive comments or revisions are accepted by the member/client. Upon re-submission, the review process continues as before until all issues have been resolved.
- **Deliverable Acceptance Documents**: Once all revisions are complete and Priority 1 and 2 comments and revisions addressed, the member/client will sign off on the Deliverable Acceptance Document (DAD) and return a copy to Crowe. Signature deems final approval of the deliverable.

4. Description of the Proposer's invoicing process used by the Proposer.

Our centralized billing department and our project manager collaborate to prepare invoices for each client, and invoices are emailed or mailed to clients per our contact terms with you.

Payments are accepted via ACH, wire transfer, and check.

We typically invoice for our services monthly based on progress, although we have the flexibility to develop SOWs that specify invoicing for completed deliverables or milestones. As requested in the RFP, we anticipate negotiating Statements of Work for each customer contract, in which will specify whether services will be invoiced monthly based on progress or upon completion of a contracted deliverable.

We do not require a deposit for our services.

5. Any assumptions made in responding to the requirements.

Our team will base assumptions upon review of each project scope of work issued. In general, there are standard assumptions used for project delivery, including but not limited to the following:

- The [client] will assign a Project Manager to work with the Crowe project manager to align resources and serve as a point of contact.
- We account for one round of edits on deliverables, with the [client] consolidating feedback into a single draft.
- Crowe reports directly to [client] and not to any other third-party vendor.
- [client] Project Manager will facilitate internal deliverable reviews and provide consolidated feedback to Crowe within 5 business days, unless otherwise noted in the Proposal.
- [client] will make data, documentation, and subject matter experts available to our team as needed to complete project activities, including those identified that are outside of [client]. [client] executives and staff will be available to assist in this effort, including by participating in meetings, surveys, information requests, and other appropriate points of engagement to successfully achieve the objectives of the project.
- We can perform work in a mix of virtual and onsite environments. We will note in the scope of work which activities can occur onsite. We can adjust this approach per [client] preference at any time and estimate travel expenses in advance if requested.
- Each phase of the project will require formal deliverable signoff to indicate [client] acceptance. The subsequent phase of work will begin after prior phase signoff is complete and signed off.
- [client] agrees to make all management decisions, including determining which, if any, recommendations to implement.
- Department leaders and key SME staff will be available to assist in this effort. The timely completion of activities and the attendance and focused participation of all required individuals in the interviews and groups meetings will be necessary to successfully achieve the objectives of the project.
- [client] will not send any sensitive information to Crowe via unencrypted solutions. [client] will notify Crowe of any information sent that is deemed to be confidential and it will be clearly marked as such.
- Crowe's deliverables are intended for [client] personnel only.

6. Any exceptions to the requirements. If there are no exceptions, Proposer shall explicitly state that no exceptions are taken to any part of this RFP. Offer must be in compliance with stated term and conditions unless NCTCOG accepts identified exceptions of the Proposer.

No exceptions are taken to any part of this RFP. If awarded, we reserve the right to negotiate with NCTCOG to a mutually agreeable contract. Note that we already have an active contract with NCTCOG for classification and compensation studies on TXShare.

7. *Any special features or services the Proposer is proposing in response to the requirements that are included within the pricing provided.*

Not applicable.

Challenge Objectives

Additional / Respondents are invited to propose solutions that address the following operational challenges, including but not limited to:

- *How can your firm assist in the maintenance and efficiency improvements of or the total replacement of a public-sector entity's legacy Budget, Financial Management, Financial Reporting, Procurement, and other logistical systems?*

Our highly experienced team members hold certifications in both project management and organizational change management and can support prospective clients with a multitude of support services. We employ several techniques to assist with what is required before, during and after software implementations.

In addition to the procurement lifecycle support noted earlier within the proposal, Crowe will leverage our Organizational Change Management (OCM) Framework to support prospective client projects. This Framework, further described in the table below, is based on our successful track record of planning and implementing change management initiatives in the public sector. Within each Project Management Lifecycle Phase (i.e., Concept, Initiating, Planning, Executing, and Closing), the OCM Framework provides activities, tasks, recommended practices, tools, and stylized templates as a guide.

The table below provides specific scope of OCM for this project and incorporates the Client's requested OCM activities.

OCM Activities and Recommended Practices by Project Management Lifecycle Phase

Project Phase	Activities	Recommended Practices
Concept	• Define the Magnitude of the Change • Identify the Project Sponsor and Team Organization • Identify governance approach and change structure, change network	• Begin OCM Efforts Early • The Right Project Sponsor is Critical to Project Success
Initiating	• Develop the OCM Schedule • Identify and Assess Leaders as Change Supporters / Stakeholder Assessment • Change Impact Assessment	• Define Project Team Guidelines • Focus OCM Efforts on Activities and Actions • Develop Active and Sustained Executive Support for Project Success
Planning	• Determine and Plan for OCM Activities • Develop the Communication Management Plan (by stakeholder group) • Develop Training Plan (by stakeholder group)	• Identify the Training Method and Approach • Utilize Practices to Foster Two-Way Communication • First Build a Communication Strategy, then Focus on Tactics • Align Executive Leaders to Project Goals and Objectives

Project Phase	Activities	Recommended Practices
	• Deliver Planning Process Phase Communications • Support and Assist the Project Sponsor • Support Executive Leadership • Conduct Team Guidelines Session	• Establish Personal Accountability for the Project Team • Don't Underestimate the Training Effort Needed
Executing	• Determine and Plan for OCM Activities • Assess Organizational Change Readiness • Develop the OCM Plan • Execute and Monitor the Effectiveness of OCM Activities (as directed) • Assess Stakeholder Communication Needs • Update the Communication Management Plan • Deliver Project Communications • Support Managers and Supervisors • Conduct Team Guidelines and Team Effectiveness Surveys • Update the Stakeholder Management Plan • Identify and Engage Stakeholder Group Representatives • Go-Live Readiness Preparation	• Identify and Engage OCM Super Users • Provide Guidance for Identifying and Mitigating Resistance • Plan, Develop, and Conduct Training • Garner Management and Supervisor Support throughout Implementation • Provide Opportunities for People to Feel Heard • Be Repetitive and Consistent with Communications • Recognize the Need for Celebrating Project Team Successes • Recognize that Resistance is a Natural Part of the Change Process • Set Realistic Training Goals
Closing	• Close Out the OCM Project • Communicate Details on Operational Support • Evaluate and Lessons Learned • Coordinate Transition to Support / Maintenance	• Recognize Post-Deployment has Ongoing OCM Needs • Take Lessons Learned Seriously • Communications are Equally as Important after Implementation • End Users and Stakeholders Need Access to Additional Training

- *How can your firm reduce the sizable technology risk exposure resulting from software obsolescence, hardware/technical infrastructure obsolescence, and the increasing scarcity of technical resources?*

Crowe can help entities reduce their risk exposure from software obsolescence by leveraging our extensive experience with leading-edge technology solutions, our proven track record in implementing advanced ERP systems in the public sector and our helping guide other organizations through their digital transformation. By conducting thorough assessments of current technology landscapes, we identify potential areas of vulnerability where outdated software may hinder operational efficiency and compliance.

Our tailored strategies aim to modernize infrastructure, employing scalable and flexible solutions that align with evolving industry standards. Moreover, we provide ongoing support and training to ensure that organizations can seamlessly adapt to technological changes. This proactive approach not only mitigates risks associated with obsolescence but also positions entities for sustainable growth and innovation in an increasingly digital landscape.

- *How can your firm resolve much of the fragmentation of existing administrative systems environment, which hinders process efficiency due to dual data entry, system reconciliations, data-synchronization adjustments, reporting from fragmented data sources, etc.?*

During our assessment of your current state operations and technology, we will pay special attention to areas of redundancy, overlap, and gaps in functionality. We understand that without a centralized administrative software, different parts of your organization may purchase multiple types of software with repetitive functionality. This can create issues with data quality and reliability. We will help guide your organization toward a system with a “single source of truth” for all administrative data. This is where all reporting and data should derive. There are several steps we will take to ensure these areas are improved for the future state:

- **Identify opportunities to consolidate.** During current state assessment, we will collect a system inventory and document functionality for each system type. It is important for us to understand what these systems are being used for. Are there functions being duplicated? Can we eliminate certain systems or use them for their intended purpose, while moving core administrative functions to your future enterprise system?
- **Understand specific functional needs of your staff.** We know that it can be difficult to get staff on board with new technology projects, especially if that means replacing existing software in their department or division. As such, it is critical that we understand the specific functional needs of your staff and what systems are being used to meet those needs today. We want to work with your staff to identify gaps and find a solution that meets their needs more effectively than existing technology. Staff involvement in this process is critical to a successful project.

- *How would your firm incorporate functionality that meets or exceeds Federal security standards (e.g., NIST, FedRAMP Moderate), and provide security functions such as role-based segregation of duties and configurable approval rules that significantly strengthen financial controls?*

To incorporate functionality that meets or exceeds Federal security standards such as NIST and FedRAMP Moderate, Crowe would implement a multi-layered security approach focusing on compliance, role-based access, and financial control enhancements. For example, we would develop security controls that align with NIST guidelines, including encryption, audit logging, access control, and incident response.

Cyber risk is always evolving – and critical public infrastructure providers like sewerage districts are especially vulnerable. For example, supervisory control and data acquisition (SCADA) systems present a unique opportunity for hackers in organizations that limit security controls to their back-office systems.

Denial-of-service attacks on web-based applications for citizen reporting of sanitary sewer issues can be another point of vulnerability, and even industrial billing systems are not immune from risk.

To assist NCTCOG in proactively identifying and mitigating these risks, we are able to engage our public sector cybersecurity specialists. Led by **Principal Michael Del Giudice**, this team specializes in information security for public sector, regularly conducting cybersecurity assessments, developing recommendations, and augmenting the cybersecurity capacity of our government clients. Depending on your specific needs, our team can provide the following value-added services:

- Evaluate cybersecurity capabilities and perform compliance gap assessments
- Assess security from the perspective of an attacker through internal and external penetration testing
- Support maturing your organizational cybersecurity capabilities and developing recommendations related to the future state ERP system
- Provide Managed Detection and Response (MDR) services

Please visit: **www.crowe.com/services/consulting/public-sector/cybersecurity-consulting-services**

In addition, as of August 1, 2024, Crowe acquired Sylint Group, Inc, a global incident response and cybersecurity advisory firm. Sylint is an internationally recognized advisory firm with extensive experience in dealing with cyber incidents and precedent-setting court cases. The deal enhanced and expanded Crowe offerings across our cybersecurity businesses and boosted our incident response (IR) services. Read more: https://www.crowe.com/news/crowe-adds-global-incident-response-and-cybersecurity-advisory-firm-sylint-group-inc

- *What recommend improvements for a system that would be fully integrated with the financial management, asset management, and inventory functions, thereby improving process efficiency and control would your firm suggest?*

Enterprise solution evaluation projects are a perfect opportunity to assess current process and determine places for efficiencies. Regardless of the end solution, process improvements can be discussed and planned for prior to implementation. Generally, governments benefit from improvements in several areas including:

i. **Reduce manual process and utilize system workflow.** These projects provide an opportunity to reduce or eliminate paper-based processes in many cases, and utilize system functionality to move tasks through their appropriate approval channels. From the review and approval of a new purchase to the disposal of an asset, workflow can be employed strategically to minimize the number of required approvals and track data effectively.

ii. **Reduce the use of side systems for one "source of truth".** Ineffective systems lead to the use of side systems to augment functionality. This creates duplicate data, and no single system has a complete picture of all administrative activity related to finance, assets, and inventory. If a new system can be used exclusively to maintain and track all data, governments have a reliable, single "source of truth" for all reporting and activity tracking.

iii. **Re-evaluate your Chart of Accounts.** These projects present an opportunity to redesign elements of your Chart of Accounts, remove unused account codes, and consolidate existing account codes into a more efficient organization. This will allow for improvements in financial reporting, tracking revenue and expenditures, and managing assets.

iv. **Utilize the Procure to Payment lifecycle.** By tracking procurement from the point of request through the receipt (and, in the case of assets disposal) of a good or service, your organization can have an accurate financial picture at all times and be aware of impending purchases that may have budgetary and operational impacts. This includes the **integration of assets into the procurement lifecycle** to recognize assets accurately and in a timely manner.

v. **Utilize ad-hoc reporting.** Ad-hoc reporting allows system users to report as-needed across a variety of data points. While standard reporting will remain critical to audit and financial reporting needs, ad-hoc reporting provides flexibility to users to see data at a point in time and reduces the need for external tracking.

vi. **Standardize asset management policies and procedures.** Standardization and review of asset and inventory procedures allows organizations to make better use of integrated systems. Asset procurement thresholds can be configured in your future system, assisting in policy compliance and budget tracking. All asset thresholds, inventory count minimums/maximums, asset relationships, etc. should be reviewed and streamlined prior to implementation of a solution to ensure effective system function.

- *What services can your firm provide for better tracking and management of the projects and assets?*

Members of NCTCOG will have unique project needs that require detailed tracking and ongoing management through the life of the projects. We will work with each client to set up a project management infrastructure. Often, this comes in the form of a PMO, or Project Management Office. An internal PMO will allow for coordination between internal Information Technology teams and Department-level teams. A PMO will serve as a central management location for all project information and details to flow through. This can help to connect all parts of a project, including physical assets, digital assets, lessons learned, and resources related to a project.

Enterprise solutions can be used to maintain tracking of projects and project assets for many types of projects, including technology, capital, and others. There are several critical factors to consider when using technology to track projects and assets:

- Develop future system functional requirements that allow project tracking that connects to the organization's General Ledger (i.e. project subledger)
- Create project asset standards (naming conventions, data types, asset types)
- Assign responsibilities and maintain workflow approvals for maintaining project information and adding asset details

- *How can your firm achieve process standardization based on best practices through the implementation of a unified technology platform?*

Our team believes that business process redesign is the cornerstone of a successful enterprise system implementation. Without solid process based on best practices, you will not be able to take full advantage of system functionality.

Our approach to business process redesign is as follows:

i. **Gather a cross section of stakeholders.** It is critical that we include a variety of stakeholders in business process redesign conversations. We like to identify a cross-section of stakeholders for various processes to lend their input and share their thoughts on future state improvements. For example, while we may be discussing a finance-related process (i.e., processing a new purchase request), it is important to gain insight from both finance staff and department staff involved in this process. This helps greatly in establishing visibility across roles and departments and finding common ground.

ii. **Root conversations in best practice and future-thinking.** It is easy to fall back on existing processes when we do not center best practice and future-state in our process standardization discussions. Our team brings significant experience and will gather best practices research from notable industry organizations as the foundation for our future process discussions.

iii. **Build consensus and create project champions.** Process improvement begins best if it can be built from consensus. Staff need to feel invested in the project and in the improvements that are made. We make process improvement discussions highly collaborative and encourage the group to make collective decisions regarding process change. This approach empowers staff to own the process change decisions that are made and encourages them to become project champions that can implement and advocate for process change to their peers and colleagues.

iv. **Document changes and train staff.** All new or changed policy and process needs to be clearly documented and incorporated into any staff training. It is critical that process changes are easy for staff to find, and any implications on staff's current roles and responsibilities must be communicated proactively.

- *What methods would you provide for the reduction of paper-based processes by leveraging electronic workflow, approval, document management, and retention capabilities where appropriate;*

Paper processes can be burdensome, and a new system may provide the opportunity to eliminate some of those processes. There are several methods for reducing or eliminating paper processes:

i. **Evaluate and reduce required approvals.** Additional approvals are often unnecessary or have been added to processes over time due to lacking system functionality or inaccurate system data. With a reliable "source of truth" as discussed in item 4, multiple approvals per process may not be necessary. Modern systems also have roadblocks in place to help manage certain requests or tasks based on thresholds or system roles.

ii. **Utilize electronic workflow and "signoff" over paper signatures.** While wet signatures may be required in some instances, most formal approval or signoff can be done using system workflow or a digital signature. Workflow approvals within the system also allow audit traceability, where system users can see which users have viewed, edited, and approved/rejected a workflow task.

iii. **Keep data and associated documents in a centralized system location.** Your system should be the system of record for all transactions and associated information. Instead of storing printed versions of asset records, purchase details, or inventory, your system should be the primary location for storing all records. Many modern systems also allow for attachments to individual records, which can be used to tie receipts or other details about an asset to the asset record itself.

iv. **Purge unneeded data and records.** Paper documentation tends to linger in a file folder or drawer longer than is required by records retention laws, causing a buildup of paper documents and difficulty in finding required documents when needed.

   A system implementation allows you to evaluate existing data, determine what is needed and what is not, and set retention dates within the system to archive as appropriate moving forward. By using your system, you ensure that records are saved in one location, have important dates and retention information associated to them, and reduce the risk of losing records or information in their paper form.

- *What methods could your firm provide for the capturing and production of consistent, expandable set of data;*

As a technology firm with highly skilled product engineering and data science teams, we can bring valuable technical tools and innovative approaches to our projects. When required, we will collaborate with our professional Data Science team highly trained in research, economics, and innovative technology to setup a repeatable, efficient process of refreshing relevant data and analyses. Our firm has extensive experience using machine learning and artificial intelligence to expedite processes for clients, and we would welcome the opportunity to discuss this option with NCTCOG, its members, or any other public sector entities for whom this approach may bring value.

For more information, visit: **https://www.crowe.com/services/consulting/applied-ai-and-machine-learning**

- *How can your firm enable a more flexible solution to meet evolving business requirements (e.g., compliance with Governmental Accounting Standards Board [GASB] guidance) that is configurable by business users and does not require software developers to adjust/maintain system rules; and*

It is challenging to navigate the ever-evolving landscape of GASB standards, especially when some changes can fundamentally alter the financial reporting process. Crowe has extensive knowledge of federal compliance requirements under the Single Audit Act and Uniform Guidance, and we continuously monitor guidance published by the American Institute of Certified Public Accountants (AICPA), Governmental Accounting Standards Board (GASB), General Accounting Office (GAO), and other federal oversight agencies.

Our active participation in internal and external continuing professional education courses ensures all members of our team stay informed of changes impacting our clients. Through our experience with GASB implementations, we have developed a deep understanding of these changes and their potential impact on financial reporting systems. This allows us to effectively manage and adapt to the requirements, maintaining compliance and optimal functionality.

- *How would you provide for enhanced compliance with Section 508 of the Americans with Disabilities Act regarding accessibility.*

There are several factors to consider ensuring that prospective clients comply with Section 508 requirements and our team can craft a plan to walk them through the process for either existing or new ERP technology. Steps include but are not limited to the following:

a. Assessment – thorough understanding of Section 508 requirements for technology and assessment the current state of accessibility.
b. Implementation – make any necessary changes to software, incorporate accessibility testing during software development, and incorporate accessibility requirements within 3rd party vendor contracts.
c. Testing – develop and practice an appropriate testing plan, including continuous monitoring.
d. Documentation and Training – develop appropriate training materials and train staff on Section 508 requirements and how to incorporate accessibility into their work.

Crowe is experienced with Section 508 and with additional guidelines that some states have adopted that are even more rigorous. Our deliverables are accessible, and we have experience conducting accessibility QA testing of technology solutions. We will include accessibility as a core function of any ERP strategy and are familiar with how to develop technical requirements that will require accessibility of ERP platforms. It will be a baseline requirement for any ERP strategy.

- *How would your firm conduct Business Process Reviews for Finance, Human Resources, Academic/Student Affairs, Procurement functionalities?*

Enterprise-level technology projects are always challenging and require significant forethought and planning. We believe that by focusing on the development of an ERP Strategy, NCTCOG already understands the significance of a project like this and the importance of preparation. Your organization has made project preparation a priority by seeking a partner to work with them to assess current state and provide recommendations for the future.

Our Business Process Re-Engineering (BPR) methodology typically includes some business process assessment and recommendations for Business Process Reengineering (BPR) based on the feedback from stakeholders and analysis of current functionality and technology. Our Crowe team has developed a business process reengineering framework. Our Crowe team recognized a lack of industry standards and a common BPR framework that has resulted in misusing terms, such as business process reengineering, end -to-end business processes, and current state assessment for operational and technology process assessments. Our team has identified four BPR Knowledge Areas, while align to traditional project management lifecycles.

These knowledge areas include:

- BPR Lifecycle Management
- Business Analysis and Future Definition
- Business Process Redesign
- Performance Measurement

The graphic below provides an overview of our BPR framework. We will leverage components of this framework depending on an entity's need for process redesign services.

Crowe's Business Process Reengineering Framework

	Concept	Initiating	Planning	Executing	Closing
BPR Lifecycle Management	Determine the Approach	Schedule Initiating Activities	Schedule Planning Activities	Schedule Executing Activities	Close BPR Effort
	Ensure the Performance of the BPR Effort				
Business Analysis and Future Definition	Define Business Rationale	Build Case for Change	Support Solution Definition	Support DD&I	Support Continuous Improvement
	Ensure the Future State is Sound				
Business Process Design	Identify Business Impact	Understand Current Processes	Define Future Processes	Elaborate Future Processes	
	Ensure the Future State is Established				
Performance Measurement		Identify Performance Baseline	Determine Future Measures and Performance	Define Performance Reports	Generate Performance Reports
	Ensure Improvements are Measurable				

Crowe will meet with the identified project team and stakeholders to discuss all current state processes in a series of interviews. Crowe will meet with technical specialists and daily users of the current system to understand the existing ERP system landscape. This work helps the project team understand how the ERP is used within NCTCOG's larger environment and visualize interconnected systems and identify pain points. Client interviews can vary widely based on topic and involved stakeholders and require a unique approach for each. The Crowe project team adheres to a stakeholder engagement methodology that focuses on building trust and asking clear, concise, and in-depth questions to gain a comprehensive understanding of current state process and future state needs. We tailor our venue, questions, method, and approach for diverse stakeholder teams, to hear as many voices in as many mediums as possible.

Our proposed project team has extensive experience working with large-scale and diverse stakeholder groups. When in the early stages of preparing for possible enterprise technology transformation, it is important to consider functional and technical expertise of stakeholders involved in interviews and their role in current process. The Crowe project team, in collaboration with NCTCOG, will work to strategize, develop, and deliver the right communications and stakeholder questions from the right sender, at the right time, to the right audience, using the right delivery channel. Our success with client interviews comes from a blend of our experience, communication style, and ability to employ a variety of techniques to facilitate stakeholder meetings to elicit input, ideas, feedback, and drive decisions. We use the right tool at the right time, to gather information that will add value to the process.

We will work with staff functional subject matter experts (SMEs) to develop current state workflows and notate any current pain points with existing policies and procedures. As we document the baseline systems and processes, we will identify other standalone applications that must integrate with core ERP functionality.

i. Guiding Questions may include (to be tailored and finalized upon project initiation):

   1. Who are the resources responsible for activities?
   2. What are the systems and technologies currently in use that support the processes?
   3. What are the "pain points," bottlenecks, or errors?
   4. What activities can be eliminated?
   5. What processes can be improved or automated?

- *How can your firm provide efficiency enhancements to existing Time and Expense modules as desired?*

Not applicable.

- *How does your firm review and make recommendations for transitioning to or from cloud-based systems to on-premises based systems?*

Based on a comprehensive current state assessment, our team can provide tailored recommendations for transitioning between cloud-based and on-premises systems. We will work closely with each member/client to better understand their goals and objectives, and how they align to the desired future state.

In addition, we may recommend performing a readiness assessment, considering the following:

- Technical Readiness: Evaluating infrastructure compatibility and required upgrades
- Operational Readiness: Assessing staff skills and operational procedures
- Financial Readiness: Analyzing costs and budgeting requirements
- Security and Compliance Readiness: Ensuring adherence to security standards and regulations

Based on assessment activities, we will develop recommendations for the organization's consideration and review alongside the member/client to provide ongoing guidance and thought leadership to support their move forward decisions.

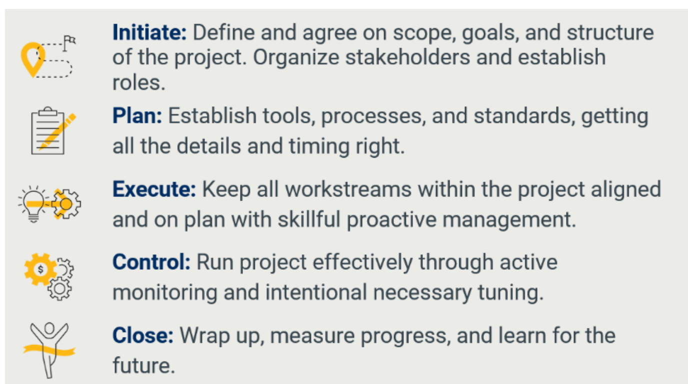
In the event the organization does undergo a transition between the two environments, our team can provide further implementation support, including change management as described throughout our response.

Our Supporting Engagement Methodologies

We have built innovative approaches, toolsets, analytical strategies, and templates that allow us to make quick progress and develop tangible plan components with agility. Our effective methodologies are nimble, operational, and tailored to you, with the laser focus that your operations directly impact the prospective clients. We understand each project will employ a different methodology, tasks and activities, and deliverables – all based on which of the possible service areas it resides. Crowe will leverage several engagement delivery methodologies. Our methodology frameworks have been developed and refined over the years based on Crowe's and our proposed team's experiences.

Project Management Approach

As mentioned previously, our team brings rigorous project management expertise, real-world experience, and toolkits to our work. Each of our proposed team members possess a project management certification (PMP, PMO-CP, or CAPM), or an organizational change management certification (CCMP, OCMP). Crowe's 5-phase project and program management approach, aligned with the Project Management Institute's (PMI) Project Management Body of Knowledge (PMBOK®) and will be utilized across this engagement with you. This ensures the appropriate disciplines, structures, tools and communication channels are in place to manage and align all work efforts and support a successful initiative.



Business Analysis Approach

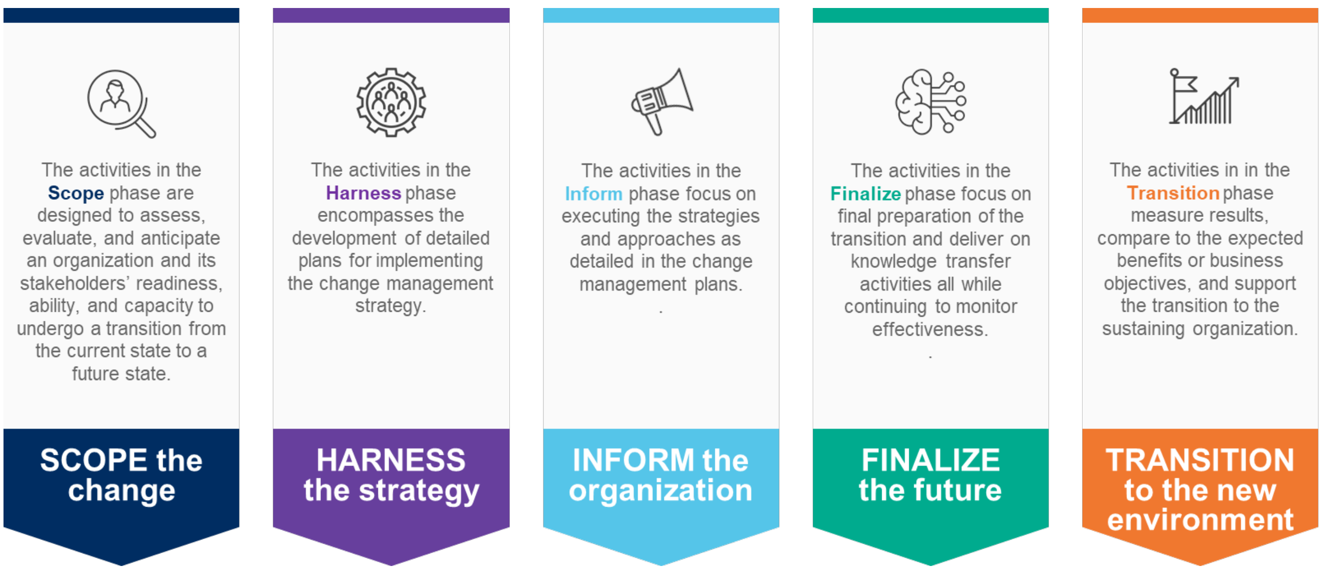
Crowe's business analysis methodology is based upon a combination of deep experience in business analysis and industry standards - specifically, the International Institute of Business Analysis' (IIBA) Business Analysis Body of Knowledge (BABOK). Our team's underlying competencies and skills has been refined over the years, including incorporating both Artificial Intelligence (AI) and Machine Learning (ML) within our approach, where applicable. As represented in the diagram below, the business analysis methodology is comprised of five components: preparing, conducting, documenting, and confirming business analysis. All these activities are supported by the Crowe team's underlying competencies and skills and has been refined over the years based on our experience.

Crowe's Project Managers and Business Analysis practitioners understand the importance of proper planning activities such as the alignment of project goals, establishment of project management mechanisms and standards, identification of stakeholders, selection of business analysis processes, selection of requirements management processes, and monitoring and controlling techniques. These planning activities are vital for establishing a foundation for the downstream success of all other business analysis activities.

Organizational Change Management Approach

Crowe employs elements of our organizational change management (OCM) framework into all our projects, as we value its impact on a project's overall success. Our framework or SHIFT, is rooted in industry standards including both Prosci ® and the Association of Change Management Professionals, and several of our proposed project team members are certified change management practitioners

Crowe's SHIFT OCM framework is a five-phase journey that guides individuals and the organization from current state to the desired future state. By implementing effective change management processes, we assist stakeholders in remaining actively involved and committed throughout the entire change process - before, during, and after the transition.



Engagement & Facilitation

Welcome to the Crowe Strategy Lab. There is no such thing as conceptual alignment. This is why we build real-time consensus through the **Crowe Strategy Lab**. Crowe Strategy Lab is an immersive experience for collaboration and strategic development. The experience focuses on delivering a dedicated and agile planning process.

Crowe's Strategy Lab puts your strategic priorities to the test to prepare you for the road ahead. The strategic alignment of your key stakeholders drives what we do in the Lab, and your team will leave the lab excited and ready for whatever comes next.

Immersive Experience: This experience focuses on delivering a dedicated planning process, free of normal office constraints and informed by data, with tools and techniques enabling real-time, onsite development of deliverables.

Insight Prioritization: By leveraging technology, a structured process, and constituent insight data, we develop real-time deliverables.

Active Experimentation: It's here that the Strategy Lab comes to life! Taking the top priorities, Crowe facilitates thought experiments to work through the pros and cons of moving forward with those priorities.

We leverage human centered design to craft the right agenda for your sessions. Participants will leave the lab energized, with tangible ideas, and a sense of ownership in the strategic plan direction. Many strategic planning initiatives involve some level of stakeholder input and executive prioritization. What differentiates our approach is an emphasis on building deliverables in real-time; this helps stakeholders consider all engagement feedback to date and discuss competing priorities.

Pricing

Our goal in setting fees is simple: to provide long-term, cost-effective pricing for our clients. We are confident that we can work together to achieve an optimized plan and budget for NCTCOG. We understand that specific services, deliverables, and estimated hours will be developed in collaboration with individual client agencies in the development of project-specific Statements of Work.

Fees for professional services will be charged at the hourly rates below.

Consultant Team Member	Hourly Rate
Partner / Principal	$400
Senior Manager / Senior Project Manager	$380
Subject Matter Specialist	$380
Manager / Project Manager	$280
Senior Consultant	$200
Consultant	$170

Fee Assumptions:

- We will not surprise you with additional fees that have not been agreed to by all parties in advance. If a question results in significant research or additional work or if we are requested to perform a consulting project, such effort is billed separately. We will provide you with an estimate of fees for such services and obtain management approval before proceeding.
- Per the RFP, we assume we will negotiate individual Statements of Work with each client organization pursuant to our Master Services Agreement. We assume that these individual Statements of Work will detail the project scope, activities, deliverables, estimated hours, estimated timeline, fees, and payment basis (such as monthly invoices or invoicing for completed milestones).
- Each client organization will appoint a Project Manager to coordinate and oversee Crowe's work, including identifying stakeholder availability for meetings, arranging meeting logistics, and overseeing the client's completion of assigned activities per the project schedule.
- The client's Project Manager will facilitate internal deliverable reviews and provide consolidated feedback to Crowe within the timeframes established in each Statement of Work and Project Schedule.
- The client will make data, documentation, and subject matter experts available to our team as needed to complete project activities. Client executives and staff will be available to assist in this effort, including by participating in meetings, surveys, information requests, and other appropriate points of engagement to successfully achieve the objectives of the project.
- The client will not send any sensitive information to Crowe via unencrypted solutions. The client will notify Crowe of any information sent that is deemed to be confidential and it will be clearly marked as such.
- We can perform work in a mix of virtual and onsite environments. We are happy to discuss this directly with client agencies as we tailor a Statement of Work to their individual project needs. We are also able to estimate travel expenses in advance if requested.

- Each phase of a Statement of Work will require formal deliverable signoff to indicate the client's acceptance. The subsequent phase of work will begin after prior phase signoff is complete and signed off.
- The client agrees to make all management decisions, including determining which, if any, recommendations to implement.
- Crowe's deliverables are intended for the client's personnel only.
- Crowe reports directly to the client and not to any third-party vendor.
- We ask clients to pay invoices via check, ACH, or wire transfer.
- Crowe may also utilize third-party providers used in the ordinary course of Crowe's business operations, including without limitation, providers such as Microsoft, Rackspace, Crowe Horwath IT Services LLP (a subsidiary owned and controlled by Crowe), information security providers, and other ordinary-course third-party providers.

Fees for Additional Services

- Professional fees for special projects outside of the agreed-upon scope will be determined based on project factors, such as type of project, subject matter experience required, scope, and resource requirements. Prior to commencing additional services, we will obtain your approval and agreement on the scoping and pricing.
- If Crowe is requested by NCTCOG, any third-party, or any other person or entity, by subpoena, investigation, other legal process, or other request to produce documents or testimony pertaining to NCTCOG or the Services, and Crowe is not named as a party in the proceeding, NCTCOG will pay Crowe for its professional time, plus out of pocket expenses, costs, and fees, as well as reasonable attorney fees, incurred in responding to such request.

HUB Bonus

5 additional points will be awarded upon submission of proof of certification as a Historically Underutilized Business (HUB), Minority, Women-Owned or Disadvantaged Business Enterprise.

Crowe does not qualify for the HUB Bonus.

Required Attachments

We have provided the Required Attachments on the following pages:

- Cover Sheet *(provided in section 1)*
- Attachment I: Instructions for Proposals Compliance and Submittal
- Attachment II: Certification of Offeror
- Attachment III: Certification Regarding Debarment
- Attachment IV: Restrictions on Lobbying
- Attachment V: Drug-Free Workplace Certification
- Attachment VI: Certification Regarding Disclosure of Conflict of Interest
- Attachment VII: Certification of Fair Business Practices
- Attachment VIII: Certification of Good Standing Texas Corporate Franchise Tax Certification
- Attachment IX: Historically Underutilized Businesses
- Attachment X: Federal and State of Texas Required Procurement Provisions
- Exhibit A: Description of Desired Product Categories for Proposed Pricing
- Exhibit B: Sample Market Basket Form
- Exhibit C: Service Area Designation Forms

Due to varying file types, these pages will not be reflected on our Table of Contents.

REQUIRED ATTACHMENT CHECKLIST

Please utilize this checklist to ensure that all required attachments are included with your proposal. IF AN ATTACHMENT DOES NOT APPLY, PLEASE MARK AS "**NOT APPLICABLE**" AND SUBMIT WITH THE PROPOSAL. FAILURE TO SUBMIT **ALL REQUIRED DOCUMENTS** MAY NEGATIVELY IMPACT YOUR EVALUATION SCORE.

- ☑ Page 1 - Cover Sheet
- ☑ Page 19 - Attachment I: Instructions for Proposals Compliance and Submittal
- ☑ Page 20 - Attachment II: Certification of Offeror
- ☑ Page 21 - Attachment III: Certification Regarding Debarment
- ☑ Page 22 - Attachment IV: Restrictions on Lobbying
- ☑ Page 24 - Attachment V: Drug-Free Workplace Certification
- ☑ Page 25 - Attachment VI: Certification Regarding Disclosure of Conflict of Interest
- ☑ Page 28 - Attachment VII: Certification of Fair Business Practices
- ☑ Page 29 - Attachment VIII: Certification of Good Standing Texas Corporate Franchise Tax Certification
- ☑ Page 30 - Attachment IX: Historically Underutilized Businesses, Minority Or Women-Owned Or Disadvantaged Business Enterprises
- ☑ Page 31 - Attachment X: Federal and State of Texas Required Procurement Provisions
- ☑ Page 34 - Exhibit A: Description of Desired Product Categories for Proposed Pricing
- ☑ Page 36 - Exhibit B: Sample Market Basket Form
- ☑ Page 38 – Exhibit C: Service Area Designation Forms
- ☑ Respondent recognizes that all proposals must be submitted electronically through Public Purchase by the RFP due date and time. All other forms of submissions will be deemed nonresponsive and will not be opened or considered.

ATTACHMENT I:
INSTRUCTIONS FOR PROPOSALS COMPLIANCE AND SUBMITTAL

Compliance with the Solicitation

Submissions must be in strict compliance with this solicitation. Failure to comply with all provisions of the solicitation may result in disqualification.

Compliance with the NCTCOG Standard Terms and Conditions

By signing its submission, Offeror acknowledges that it has read, understands and agrees to comply with the NCTCOG standard terms and conditions.

Acknowledgment of Insurance Requirements

By signing its submission, Offeror acknowledges that it has read and understands the insurance requirements for the submission. Offeror also understands that the evidence of required insurance must be submitted within ten (10) working days following notification of its offer being accepted; otherwise, NCTCOG may rescind its acceptance of the Offeror's proposals. The insurance requirements are outlined in Section 2.2 - General Terms and Conditions.

Name of Organization/Contractor(s):

Crowe LLP

Signature of Authorized Representative:

Date: 2/25/2025

ATTACHMENT II:
CERTIFICATIONS OF OFFEROR

I hereby certify that the information contained in this proposal and any attachments is true and correct and may be viewed as an accurate representation of proposed services to be provided by this organization. I certify that no employee, board member, or agent of the North Central Texas Council of Governments has assisted in the preparation of this proposal. I acknowledge that I have read and understand the requirements and provisions of the solicitation and that the organization will comply with the regulations and other applicable local, state, and federal regulations and directives in the implementation of this contract.

I also certify that I have read and understood all sections of this solicitation and will comply with all the terms and conditions as stated; and furthermore that I, Susannah R.K Heitger (typed or printed name) certify that I am the Principal (title) of the corporation, partnership, or sole proprietorship, or other eligible entity named as offeror and respondent herein and that I am legally authorized to sign this offer and to submit it to the North Central Texas Council of Governments, on behalf of said offeror by authority of its governing body.

Name of Organization/Contractor(s):

Crowe LLP

Signature of Authorized Representative:

Date: 2/25/2025

ATTACHMENT III:

CERTIFICATION REGARDING DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITY MATTERS

This certification is required by the Federal Regulations Implementing Executive Order 12549, Debarment and Suspension, 45 CFR Part 93, Government-wide Debarment and Suspension, for the Department of Agriculture (7 CFR Part 3017), Department of Labor (29 CFR Part 98), Department of Education (34 CFR Parts 85, 668, 682), Department of Health and Human Services (45 CFR Part 76).

The undersigned certifies, to the best of his or her knowledge and belief, that both it and its principals:

1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency;

2. Have not within a three-year period preceding this contract been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or Local) transaction or contract under a public transaction, violation of federal or State antitrust statues or commission of embezzlement, theft, forgery, bribery, falsification, or destruction of records, making false Proposals, or receiving stolen property;

3. Are not presently indicated for or otherwise criminally or civilly charged by a government entity with commission of any of the offense enumerated in Paragraph (2) of this certification; and,

4. Have not within a three-year period preceding this contract had one or more public transactions terminated for cause or default.

Where the prospective recipient of federal assistance funds is unable to certify to any of the qualifications in this certification, such prospective recipient shall attach an explanation to this certification form.

Name of Organization/Contractor(s):

Crowe LLP
____

Signature of Authorized Representative:

____

Date: 2/25/2025

ATTACHMENT IV: RESTRICTIONS ON LOBBYING

Section 319 of Public Law 101-121 prohibits recipients of federal contracts, grants, and loans exceeding $100,000 at any tier under a federal contract from using appropriated funds for lobbying the Executive or Legislative Branches of the federal government in connection with a specific contract, grant, or loan. Section 319 also requires each person who requests or receives a federal contract or grant in excess of $100,000 to disclose lobbying.

No appropriated funds may be expended by the recipient of a federal contract, loan, or cooperative agreement to pay any person for influencing or attempting to influence an officer or employee of any federal executive department or agency as well as any independent regulatory commission or government corporation, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with any of the following covered federal actions: the awarding of any federal contract, the making of any federal grant, the making of any federal loan the entering into of any cooperative agreement and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.

As a recipient of a federal grant exceeding $100,000, NCTCOG requires its subcontractors of that grant to file a certification, set forth in Appendix B.1, that neither the agency nor its employees have made, or will make, any payment prohibited by the preceding paragraph.

Subcontractors are also required to file with NCTCOG a disclosure form, set forth in Appendix B.2, if the subcontractor or its employees have made or have agreed to make any payment using nonappropriated funds (to include profits from any federal action), which would be prohibited if paid for with appropriated funds.

LOBBYING CERTIFICATION
FOR CONTRACTS, GRANTS, LOANS, AND COOPERATIVE AGREEMENTS

The undersigned certifies, to the best of his or her knowledge or belief, that:

1. No federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an officer or employee of a Member of Congress in connection with the awarding of any federal contract, the making of any federal loan, the entering into of any cooperative Contract, and the extension, continuation, renewal, amendment, or modification or any federal contract, grant, loan, or cooperative contract; and

2. If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this federal contract, grant, loan, and or cooperative contract, the undersigned shall complete and submit Standard Form – LLL, "Disclosure Form to Report Lobbying", in accordance with the instructions.

3. The undersigned shall require that the language of this certification be included in the award documents for all sub-awards at all tiers and that all sub-recipients shall certify accordingly.

Name of Organization/Contractor(s):

Crowe LLP

Signature of Authorized Representative:

Date: 2/25/2025

ATTACHMENT V:
DRUG-FREE WORKPLACE CERTIFICATION

The Crowe LLP (company name) will provide a Drug Free Work Place in compliance with the Drug Free Work Place Act of 1988. The unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited on the premises of the Crowe LLP (company name) or any of its facilities. Any employee who violates this prohibition will be subject to disciplinary action up to and including termination. All employees, as a condition of employment, will comply with this policy.

CERTIFICATION REGARDING DRUG-FREE WORKPLACE

This certification is required by the Federal Regulations Implementing Sections 5151-5160 of the Drug-Free Workplace Act, 41 U.S.C. 701, for the Department of Agriculture (7 CFR Part 3017), Department of Labor (29 CFR Part 98), Department of Education (34 CFR Parts 85, 668 and 682), Department of Health and Human Services (45 CFR Part 76).

The undersigned subcontractor certifies it will provide a drug-free workplace by:

Publishing a policy Proposal notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace and specifying the consequences of any such action by an employee;

Establishing an ongoing drug-free awareness program to inform employees of the dangers of drug abuse in the workplace, the subcontractor's policy of maintaining a drug-free workplace, the availability of counseling, rehabilitation and employee assistance programs, and the penalties that may be imposed on employees for drug violations in the workplace;

Providing each employee with a copy of the subcontractor's policy Proposal;

Notifying the employees in the subcontractor's policy Proposal that as a condition of employment under this subcontract, employees shall abide by the terms of the policy Proposal and notifying the subcontractor in writing within five days after any conviction for a violation by the employee of a criminal drug abuse statue in the workplace;

Notifying the Board within ten (10) days of the subcontractor's receipt of a notice of a conviction of any employee; and,

Taking appropriate personnel action against an employee convicted of violating a criminal drug statue or requires such employee to participate in a drug abuse assistance or rehabilitation program.

Name of Organization/Contractor(s):

Crowe LLP

Signature of Authorized Representative:

Date: 2/25/2025

ATTACHMENT VI:
CERTIFICATION REGARDING DISCLOSURE OF CONFLICT OF INTEREST

The undersigned certifies that, to the best of his or her knowledge or belief, that:

"No employee of the contractor, no member of the contractor's governing board or body, and no person who exercises any functions or responsibilities in the review or approval of the undertaking or carrying out of this contract shall participate in any decision relating to this contract which affects his/her personal pecuniary interest.

Executives and employees of contractor shall be particularly aware of the varying degrees of influence that can be exerted by personal friends and associates and, in administering the contract, shall exercise due diligence to avoid situations which give rise to an assertion that favorable treatment is being granted to friends and associates. When it is in the public interest for the contractor to conduct business with a friend or associate of an executive or employee of the contractor, an elected official in the area or a member of the North Central Texas Council of Governments, a permanent record of the transaction shall be retained.

Any executive or employee of the contractor, an elected official in the area or a member of the NCTCOG, shall not solicit or accept money or any other consideration from a third person, for the performance of an act reimbursed in whole or part by contractor or Department. Supplies, tools, materials, equipment or services purchased with contract funds shall be used solely for purposes allowed under this contract. No member of the NCTCOG shall cast a vote on the provision of services by that member (or any organization which that member represents) or vote on any matter which would provide a direct or indirect financial benefit to the member or any business or organization which the member directly represents".

No officer, employee or paid consultant of the contractor is a member of the NCTCOG.

No officer, manager or paid consultant of the contractor is married to a member of the NCTCOG.

No member of NCTCOG directly owns, controls or has interest in the contractor.

The contractor has disclosed any interest, fact, or circumstance that does or may present a potential conflict of interest.

No member of the NCTCOG receives compensation from the contractor for lobbying activities as defined in Chapter 305 of the Texas Government Code.

Should the contractor fail to abide by the foregoing covenants and affirmations regarding conflict of interest, the contractor shall not be entitled to the recovery of any costs or expenses incurred in relation to the contract and shall immediately refund to the North Central Texas Council of Governments any fees or expenses that may have been paid under this contract and shall further be liable for any other costs incurred or damages sustained by the NCTCOG as it relates to this contract.

Name of Organization/Contractor(s):

Crowe LLP
____

Signature of Authorized Representative:

____

Date: 2/25/2025

CONFLICT OF INTEREST QUESTIONNAIRE

FORM CIQ

For vendor doing business with local governmental entity

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. *See* Section 176.006(a-1), Local Government Code.

A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

OFFICE USE ONLY

Date Received

1 **Name of vendor who has a business relationship with local governmental entity.**

Crowe LLP has nothing to report.

2 ☐ **Check this box if you are filing an update to a previously filed questionnaire.** (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

3 **Name of local government officer about whom the information is being disclosed.**

____
Name of Officer

4 **Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.**

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

☐ Yes ☐ No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

☐ Yes ☐ No

5 **Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.**

6 ☐ Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).

7

____
Signature of vendor doing business with the governmental entity

2/25/2025
Date

CONFLICT OF INTEREST QUESTIONNAIRE
For vendor doing business with local governmental entity

A complete copy of Chapter 176 of the Local Government Code may be found at http://www.statutes.legis.state.tx.us/Docs/LG/htm/LG.176.htm. For easy reference, below are some of the sections cited on this form.

Local Government Code § 176.001(1-a): "Business relationship" means a connection between two or more parties based on commercial activity of one of the parties. The term does not include a connection based on:

(A) a transaction that is subject to rate or fee regulation by a federal, state, or local governmental entity or an agency of a federal, state, or local governmental entity;

(B) a transaction conducted at a price and subject to terms available to the public; or

(C) a purchase or lease of goods or services from a person that is chartered by a state or federal agency and that is subject to regular examination by, and reporting to, that agency.

Local Government Code § 176.003(a)(2)(A) and (B):

(a) A local government officer shall file a conflicts disclosure statement with respect to a vendor if:

***

(2) the vendor:

(A) has an employment or other business relationship with the local government officer or a family member of the officer that results in the officer or family member receiving taxable income, other than investment income, that exceeds $2,500 during the 12-month period preceding the date that the officer becomes aware that

(i) a contract between the local governmental entity and vendor has been executed; or

(ii) the local governmental entity is considering entering into a contract with the vendor;

(B) has given to the local government officer or a family member of the officer one or more gifts that have an aggregate value of more than $100 in the 12-month period preceding the date the officer becomes aware that:

(i) a contract between the local governmental entity and vendor has been executed; or

(ii) the local governmental entity is considering entering into a contract with the vendor.

Local Government Code § 176.006(a) and (a-1)

(a) A vendor shall file a completed conflict of interest questionnaire if the vendor has a business relationship with a local governmental entity and:

(1) has an employment or other business relationship with a local government officer of that local governmental entity, or a family member of the officer, described by Section 176.003(a)(2)(A);

(2) has given a local government officer of that local governmental entity, or a family member of the officer, one or more gifts with the aggregate value specified by Section 176.003(a)(2)(B), excluding any gift described by Section 176.003(a-1); or

(3) has a family relationship with a local government officer of that local governmental entity.

(a-1) The completed conflict of interest questionnaire must be filed with the appropriate records administrator not later than the seventh business day after the later of:

(1) the date that the vendor:

(A) begins discussions or negotiations to enter into a contract with the local governmental entity; or

(B) submits to the local governmental entity an application, response to a request for proposals or bids, correspondence, or another writing related to a potential contract with the local governmental entity; or

(2) the date the vendor becomes aware:

(A) of an employment or other business relationship with a local government officer, or a family member of the officer, described by Subsection (a);

(B) that the vendor has given one or more gifts described by Subsection (a); or

(C) of a family relationship with a local government officer.

ATTACHMENT VII:
CERTIFICATION OF FAIR BUSINESS PRACTICES

That the submitter has not been found guilty of unfair business practices in a judicial or state agency administrative proceeding during the preceding year. The submitter further affirms that no officer of the submitter has served as an officer of any company found guilty of unfair business practices in a judicial or state agency administrative during the preceding year.

Name of Organization/Contractor(s):

Crowe LLP
____

Signature of Authorized Representative:

____

Date: 2/25/2025

ATTACHMENT VIII:
CERTIFICATION OF GOOD STANDING
TEXAS CORPORATE FRANCHISE TAX CERTIFICATION

Pursuant to Article 2.45, Texas Business Corporation Act, state agencies may not contract with for profit corporations that are delinquent in making state franchise tax payments. The following certification that the corporation entering into this offer is current in its franchise taxes must be signed by the individual authorized on Form 2031, Corporate Board of Directors Resolution, to sign the contract for the corporation.

The undersigned authorized representative of the corporation making the offer herein certified that the following indicated Proposal is true and correct and that the undersigned understands that making a false Proposal is a material breach of contract and is grounds for contract cancellation.

Indicate the certification that applies to your corporation:

✔ ____________ The Corporation is a for-profit corporation and certifies that it is not delinquent in its franchise tax payments to the State of Texas.

____________ The Corporation is a non-profit corporation or is otherwise not subject to payment of franchise taxes to the State of Texas.

Type of Business (if not corporation):

- ☐ Sole Proprietor
- ☐ Partnership
- ☑ Other Limited Liability Partership

Pursuant to Article 2.45, Texas Business Corporation Act, the North Central Texas Council of Governments reserves the right to request information regarding state franchise tax payments.

Susannah R.K Heitger
(Printed/Typed Name and Title of Authorized Representative)

[signature]
Signature

Date: 2/25/2025

ATTACHMENT IX:
HISTORICALLY UNDERUTILIZED BUSINESSES, MINORITY OR WOMEN-OWNED OR DISADVANTAGED BUSINESS ENTERPRISES

Historically Underutilized Businesses (HUBs), minority or women-owned or disadvantaged businesses enterprises (M/W/DBE) are encouraged to participate in the solicitation process. Representatives from HUB companies should identify themselves and submit a copy of their certification.

NCTCOG recognizes the certifications of both the State of Texas Program and the North Central Texas Regional Certification Agency. Companies seeking information concerning HUB certification are urged to contact:

State of Texas HUB Program
Texas Comptroller of Public Accounts
Lyndon B. Johnson State Office Building
111 East 17th Street
Austin, Texas 78774
(512) 463-6958
http://www.window.state.tx.us/procurement/prog/hub/

Local businesses seeking M/W/DBE certification should contact:

North Central Texas Regional Certification Agency
624 Six Flags Drive, Suite 100
Arlington, TX 76011
(817) 640-0606
http://www.nctrca.org/certification.html

Submitter must include a copy of its minority certification documentation as part of this solicitation.
If your company is already certified, attach a copy of your certification to this form and return with your proposal.

Indicate all that apply:

______Minority-Owned Business Enterprise

✓ Women-Owned Business Enterprise

______Disadvantaged Business Enterprise

ATTEST TO Attachments of Certification:

Helen Dickey
Authorized Signature

Helen Dickey — 1-22-2025
Typed Name — Date

Subscribed and sworn to before me this 22nd day of January (month), 2025 in Streetman (city), Freestone (county), Texas (state).

Monica Pummell

SEAL

MONICA PUMMELL
Notary Public, State of Texas
Comm. Expires 01-16-2029
Notary ID 124309952

Notary Public in and for Freestone (County),
State of Texas Commission expires: 01/16/29

Texas Historically Underutilized Business (HUB) Certificate

Certificate/VID Number: **1272223411400**
Approval Date: **September 6, 2024**
Scheduled Expiration Date: **October 1, 2025**

In accordance with the Memorandum of Agreement between the
WOMEN'S BUSINESS COUNCIL - SOUTHWEST (WBCS)
and the Texas Comptroller of Public Accounts (CPA), the CPA hereby certifies that

Harris & Dickey, LLC

has successfully met the established requirements of the State of Texas Historically Underutilized Business (HUB) Program to be recognized as a HUB. This certificate printed **September 6, 2024**, supersedes any registration and certificate previously issued by the HUB Program. If there are any changes regarding the information (i.e., business structure, ownership, day-to-day management, operational control, addresses, phone and fax numbers or authorized signatures) provided in the submission of the business; application for registration/certification into WBCS's program, you must immediately (within 30 days of such changes) notify WBCS's program in writing. The CPA reserves the right to conduct a compliance review at any time to confirm HUB eligibility. HUB certification may be suspended or revoked upon findings of ineligibiliy. If your firm ceases to remain certified in the WBCS's program, you must apply and become certified through the State of Texas HUB program to maintain your HUB certification.

Statewide HUB Program
Statewide Procurement Division

Note: In order for State agencies and institutions of higher education (universities) to be credited for utilizing this business as a HUB, they must award payment under the Certificate/VID Number identified above. Agencies, universities and prime contractors are encouraged to verify the company’s HUB certification prior to issuing a notice of award by accessing the Internet (**https://mycpa.cpa.state.tx.us/tpasscmblsearch/index.jsp**) or by contacting the HUB Program at **512-463-5872** or toll-free in Texas at **1-888-863-5881**.

ATTACHMENT X

NCTCOG FEDERAL AND STATE OF TEXAS REQUIRED PROCUREMENT PROVISIONS

The following provisions are mandated by Federal and/or State of Texas law. Failure to certify to the following will result in disqualification of consideration for contract. Entities or agencies that are not able to comply with the following will be ineligible for consideration of contract award.

PROHIBITED TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT CERTIFICATION

This Contract is subject to the Public Law 115-232, Section 889, and 2 Code of Federal Regulations (CFR) Part 200, including §200.216 and §200.471, for prohibition on certain telecommunications and video surveillance or equipment. Public Law 115-232, Section 889, identifies that restricted telecommunications and video surveillance equipment or services (e.g., phones, internet, video surveillance, cloud servers) include the following:

A) Telecommunications equipment that is produced by Huawei Technologies Company or ZTE Corporation (or any subsidiary or affiliates of such entities).

B) Video surveillance and telecommunications equipment produced by Hytera Communications Corporations, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company (or any subsidiary or affiliates of such entities).

C) Telecommunications or video surveillance services used by such entities or using such equipment.

D) Telecommunications or video surveillance equipment or services produced or provided by an entity that the Secretary of Defense, Director of the National Intelligence, or the Director of the Federal Bureau of Investigation reasonably believes to be an entity owned or controlled by the government of a covered foreign country.

The entity identified below, through its authorized representative, hereby certifies that no funds under this Contract will be obligated or expended to procure or obtain telecommunication or video surveillance services or equipment or systems that use covered telecommunications equipment or services as a substantial or essential component of any system, or as a critical technology as part of any system prohibited by 2 CFR §200.216 and §200.471, or applicable provisions in Public Law 115-232 Section 889.

☑ **The Contractor or Subrecipient hereby certifies that it does comply with the requirements of 2 CFR §200.216 and §200.471, or applicable regulations in Public Law 115-232 Section 889.**

SIGNATURE OF AUTHORIZED PERSON: SRKH

NAME OF AUTHORIZED PERSON: Susannah R.K Heitger

NAME OF COMPANY: Crowe LLP

DATE: 2/25/2025

-OR-

☐ **The Contractor or Subrecipient hereby certifies that it cannot comply with the requirements of 2 CFR §200.216 and §200.471, or applicable regulations in Public Law 115-232 Section 889.**

SIGNATURE OF AUTHORIZED PERSON: __________

NAME OF AUTHORIZED PERSON: __________

NAME OF COMPANY: __________

DATE: __________

DISCRIMINATION AGAINST FIREARMS ENTITIES OR FIREARMS TRADE ASSOCIATIONS

This contract is subject to the Texas Local Government Code chapter 2274, Subtitle F, Title 10, prohibiting contracts with companies who discriminate against firearm and ammunition industries.

TLGC chapter 2274, Subtitle F, Title 10, identifies that "discrimination against a firearm entity or firearm trade association" includes the following:

A) means, with respect to the entity or association, to:

I. refuse to engage in the trade of any goods or services with the entity or association based solely on its status as a firearm entity or firearm trade association; and

II. refrain from continuing an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association; or

III. terminate an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association.

B) An exception to this provision excludes the following:

I. contracts with a sole-source provider; or

II. the government entity does not receive bids from companies who can provide written verification.

The entity identified below, through its authorized representative, hereby certifies that they have no practice, policy, guidance, or directive that discriminates against a firearm entity or firearm trade association; and that they will not discriminate during the term of the contract against a firearm entity or firearm trade association as prohibited by Chapter 2274, Subtitle F, Title 10 of the Texas Local Government Code.

☑ **The Contractor or Subrecipient hereby certifies that it does comply with the requirements of Chapter 2274, Subtitle F, Title 10.**

SIGNATURE OF AUTHORIZED PERSON: SRKH

NAME OF AUTHORIZED PERSON: Susannah R.K Heitger

NAME OF COMPANY: Crowe LLP

DATE: 2/25/2025

-OR-

☐ **The Contractor or Subrecipient hereby certifies that it cannot comply with the requirements of Chapter 2274, Subtitle F, Title 10.**

SIGNATURE OF AUTHORIZED PERSON: ______________________

NAME OF AUTHORIZED PERSON: ______________________

NAME OF COMPANY: ______________________

DATE: ______________________

BOYCOTTING OF CERTAIN ENERGY COMPANIES

This contract is subject to the Texas Local Government Code chapter 809, Subtitle A, Title 8, prohibiting contracts with companies who boycott certain energy companies.

TLGC chapter Code chapter 809, Subtitle A, Title 8, identifies that “boycott energy company” means, without an ordinary business purpose, refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations with a company because the company:

I. engages in the exploration, production, utilization, transportation, sale, or manufacturing of fossil fuel-based energy and does not commit or pledge to meet environmental standards beyond applicable federal and state law; and
II. does business with a company described by paragraph (I).

The entity identified below, through its authorized representative, hereby certifies that they do not boycott energy companies, and that they will not boycott energy companies during the term of the contract as prohibited by Chapter 809, Subtitle A, Title 8 of the Texas Local Government Code.

☑ The Contractor or Subrecipient hereby certifies that it does comply with the requirements of Chapter 809, Subtitle A, Title 8.

SIGNATURE OF AUTHORIZED PERSON: SRKH

NAME OF AUTHORIZED PERSON: Susannah R.K Heitger

NAME OF COMPANY: Crowe LLP

DATE: 2/25/2025

-OR-

☐ The Contractor or Subrecipient hereby certifies that it cannot comply with the requirements of Chapter 809, Subtitle A, Title 8.

SIGNATURE OF AUTHORIZED PERSON: ______________________

NAME OF AUTHORIZED PERSON: ______________________

NAME OF COMPANY: ______________________

DATE: ______________________

EXHIBIT C

<table>
<tr><td>RFP 2025-017</td><td colspan="3">Texas Service Area Designation or Identification</td></tr>
<tr><td>Proposer Name:</td><td colspan="3">Crowe LLP</td></tr>
<tr><td rowspan="5">Notes:</td><td colspan="3">Indicate in the appropriate box whether you are proposing to service the entire State of Texas</td></tr>
<tr><td>Will service the entire State of Texas ✔</td><td colspan="2">Will not service the entire State of Texas</td></tr>
<tr><td></td><td colspan="2"></td></tr>
<tr><td colspan="3"></td></tr>
<tr><td colspan="3">If you are not proposing to service the entire State of Texas, designate on the form below the regions that you are proposing to provide goods and/or services to. By designating a region or regions, you are certifying that you are willing and able to provide the proposed goods and services.</td></tr>
<tr><td>Item</td><td>Region</td><td>Metropolitan Statistical Areas</td><td>Designated Service Area</td></tr>
<tr><td>1.</td><td>North Central Texas</td><td>16 counties in the Dallas-Fort Worth Metropolitan area</td><td></td></tr>
<tr><td>2.</td><td>High Plains</td><td>Amarillo
Lubbock</td><td></td></tr>
<tr><td>3.</td><td>Northwest</td><td>Abilene
Wichita Falls</td><td></td></tr>
<tr><td>4.</td><td>Upper East</td><td>Longview
Texarkana, TX-AR Metro Area
Tyler</td><td></td></tr>
<tr><td>5.</td><td>Southeast</td><td>Beaumont-Port Arthur</td><td></td></tr>
<tr><td>6.</td><td>Gulf Coast</td><td>Houston-The Woodlands-Sugar Land</td><td></td></tr>
<tr><td>7.</td><td>Central Texas</td><td>College Station-Bryan
Killeen-Temple
Waco</td><td></td></tr>
<tr><td>8.</td><td>Capital Texas</td><td>Austin-Round Rock</td><td></td></tr>
<tr><td>9.</td><td>Alamo</td><td>San Antonio-New Braunfels
Victoria</td><td></td></tr>
<tr><td>10.</td><td>South Texas</td><td>Brownsville-Harlingen
Corpus Christi
Laredo
McAllen-Edinburg-Mission</td><td></td></tr>
<tr><td>11.</td><td>West Texas</td><td>Midland
Odessa
San Angelo</td><td></td></tr>
<tr><td>12.</td><td>Upper Rio Grande</td><td>El Paso</td><td></td></tr>
</table>

RFP 2025-017	Nationwide Service Area Designation or Identification Form		
Proposer Name:	Crowe LLP		
Notes:	**Indicate in the appropriate box whether you are proposing to provide service to all Fifty (50) States.**		
	Will service all Fifty (50) States ✔	Will not service Fifty (50) States	
	If you are not proposing to service to all Fifty (50) States, then designate on the form below the States that you will provide service to. By designating a State or States, you are certifying that you are willing and able to provide the proposed goods and services in those States. **If you are only proposing to service a specific region, metropolitan statistical area (MSA), or city in a State, then indicate as such in the appropriate column box.**		

Item	**State**	**Region/MSA/City**	**Designated as a Service Area**
1.	Alabama		
2.	Alaska		
3.	Arizona		
4.	Arkansas		
5.	California		
6.	Colorado		
7.	Connecticut		
8.	Delaware		
9.	Florida		
10.	Georgia		
11.	Hawaii		
12.	Idaho		
13.	Illinois		
14.	Indiana		
15.	Iowa		
16.	Kansas		
17.	Kentucky		
18.	Louisiana		
19.	Maine		
20.	Maryland		
21.	Massachusetts		

22.	Michigan		
23.	Minnesota		
24.	Mississippi		
25.	Missouri		
26.	Montana		
27.	Nebraska		
28.	Nevada		
29.	New Hampshire		
30.	New Jersey		
31.	New Mexico		
32.	New York		
33.	North Carolina		
34.	North Dakota		
35.	Ohio		
36.	Oregon		
37.	Oklahoma		
38.	Pennsylvania		
39.	Rhode Island		
40.	South Carolina		
41.	South Dakota		
42.	Tennessee		
43.	Texas		
44.	Utah		
45.	Vermont		
46.	Virginia		
47.	Washington		
48.	West Virginia		
49.	Wisconsin		
50.	Wyoming		

Appendix A: Resumes

We have provided resumes of key personnel on the following pages.

Susannah R.K. Heitger
Principal
PMP, Prosci Change Management Practitioner CCMP, PMO - CP

susannah.heitger@crowe.com
www.crowe.com

Profile

Ms. Heitger is a Partner-Principal and government specialist with over 19 years of professional experience working within and consulting to state and local government across a variety of business and technology efforts. Ms. Heitger leads the Strategy & Management Advisory practice and specializes in managing large projects for complex governmental organizations with many public and private sector stakeholders, modernizing government service delivery for constituents, and working with public sector agencies to assess, redesign, and optimize their processes to achieve measurable goals with a sound strategy. Her specialty is helping government with procurements.

Publications

- "How to Minimize Risk When Modernizing Public Safety Services" – Crowe LLP Publication
- "As Newly-Elected Officials Transition into Leadership – Where Does That Leave Internal Audit?" – Association of Local Government Auditors (ALGA)
- "Running government from the cloud: Tips for implementation teams" – MSDynamics World
- "Clearing the Hurdles to Effective Decision Making Through Predictive Analytics" – Government Advantage
- "Taking a Customer-Centric Approach to Managing and Monitoring Grants" – Government Advantage
- "Web 2.0 and Accessibility: How you can (and should) have both" – Government Advantage
- "11 Simple Steps for Justice, Public Safety, and Emergency Management Agencies Getting Started with Social Media" – Government Advantage
- "Smart Growth Provides a Wiser Approach to Development" – Government Advantage
- "Fiscal Accountability for County Jails" – Government Advantage

Education & Certifications

- Master of Public Affairs, Economic Development, and Public Management - Indiana University School of Public & Environmental Affairs
- Bachelor of Science, Public Management - Indiana University School of Public & Environmental Affairs
- Prosci Certified Change Management Practitioner (CCMP)

Client Focus:

Services:

- Public Sector Consulting – State and Local Government Agencies
- Public Sector Procurement/System Selection Studies/RFP Development
- Organizational Change Management
- Strategic Planning, IT Roadmap
- Business Analysis, Process Reengineering
- Training Development and Delivery
- Financial Analysis
- Case Management Systems
- Microsoft Dynamics CRM
- Grants Management

Industries:

- State and Local Government
- Education – K12 and Higher Ed
- Administration/Finance
- Public Sector IT
- Emergency Management/Homeland Security Agencies
- Criminal Justice
- Public Safety
- Law Enforcement and Corrections
- Economic Development/Public-Private Partnerships
- Airports and Transit
- Not-for-Profit
- Ethics Oversight Boards
- Housing
- Public Works/Sewer Management

- Project Management Professional (PMP) – Project Management Institute
- Program Management Office Certified Professional (PMO-CP) – Project Management Institute
- Justice Information Exchange Model (JIEM)

Sample Project Experience – Public Sector Strategic Planning, Assessment, IT Modernization, Organizational Change Management

- Piedmont Triad Airport Authority – ERP Implementation
- American Academy of Pediatrics – ERP Selection Support and PMO
- City of Aurora, IL – 311 / Customer Service Strategy & Implementation
- City of Aurora, IL – CAD/RMS, ERP System Needs Assessment, Procurement Support, Implementation Project Management, and Organizational Change Management
- Imperial County, CA – ERP Procurement Support
- City of Huber Heights, OH – ERP Procurement Support
- City of Indianapolis / Marion County – 311 Assessment
- City of Indianapolis Parks Department – Park Rangers Assessment and Reorganization Strategy
- Civic Federation of Chicago – Strategic Plan
- Choose DuPage – Strategic Plan
- Ottawa County, MI – Parks Commission Strategic Plan
- City of Aurora – IT Reorganization Assessment
- City of Aurora, IL – Technology Strategic Plan (www.smartaurora.com)
- Scott County, IA – Technology Strategic Plan
- Joyce Foundation – Organizational Assessment
- Kane County, IL – Strategic Plan
- Spencer Foundation – IT and Organizational Assessment
- Chicago of Chicago Business Affairs & Consumer Protection – PPV Study
- Chicago Public Schools – Financial Transformation, Risk Assessment, and Organizational Cost Savings Projects
- Chicago Public Schools – Organizational Redesign and PMO, FACE2 Department Assessment
- Chicago Teachers Pension Fund – IT Assessment and Strategy Review
- Choose DuPage DEI Advising – Connect DuPage Program Support
- City Colleges of Chicago – District and College-Wide Website Redesign Implementation & Training
- City of Aurora – Customer Service / 311 Modernization & Needs Assessment, Technology Strategy
- City of Aurora, IL – Agenda Management Process Improvement and Granicus Agenda Management System Implementation
- City of Aurora, IL – HR Payroll Process Improvement
- City of Aurora, IL – Open Data Strategy
- City of Aurora, IL – Records Digitization Strategy
- City of Birmingham, Alabama – Performance Assessment
- City of Chicago – Explore Chicago Tourism Website Implementation & Training
- City of Chicago – Internet Site Implementation & Training (former www.cityofchicago.org)
- City of Chicago Board of Ethics – Lobbyist Filing System (Website / Web Application) Implementation & Training
- City of Chicago Board of Ethics – Statement of Financial Interests Electronic Filing System (Website / Web Application) Implementation & Training
- City of Chicago, Mayor's Office – Mayoral Pages (City Micro-Site) Implementation & Training

- City of Chicago, Mayor's Office – Stimulus Website (ARRA Reporting) Implementation & Training
- City of Columbus, OH – Organizational Change Management and Business Process Reengineering for new ERP system
- City of Columbus, OH Treasurer's Office – Treasury Business Process Reengineering and Treasury Management System Implementation
- City of Columbus, OH Treasurer's Office – Banking Vendor RFP, Procurement Support, Implementation PMO
- Clerk of the Circuit Court of Cook County (IL) – Case Management System Needs Analysis
- Connecticut Conference of Municipalities – CRM Technology Assessment and Business Alignment
- Cook County Clerk of the Circuit Court – PMO over Criminal Justice Data Exchanges
- Cook County Department of Corrections - Financial System Process Improvement
- Cook County, IL – Bureau of Asset Management, Asset Management System Needs Analysis
- Cook County, IL Disproportionate Minority in Confinement Committee – Business Process Analysis & Redesign
- Indiana Department of Homeland Security - Disaster Housing & Emergency Services Strategic Plan
- Indiana Department of Homeland Security – District Level Disaster Housing Plans
- Indiana Department of Homeland Security – Fuel Needs Assessment / Strategic Plan
- Indiana Department of Workforce Development – IT Strategy & Systems Procurement Support
- Indiana Economic Development Corporation – CRM Implementation & IT Modernization
- Lake County, IL - Department of Public Works – Finance Department Process Assessment / Business Process Improvement
- Lake County, IL – Clerk / Recorder Consolidation Support
- Lake County, IL – Department of Public Works – Finance Department Process Assessment / Business Process Improvement
- Lake County, IL – Integrated Court Case Management System Review
- Lake County, IL – Regional 911 Procurement Support, PMO, Organizational Change Management
- Lake County, Illinois – CARES Act Consulting, Program Administration
- State of Illinois Department of Commerce & Economic Opportunity – Local CURE Support Program (CARES Act, CRF) Grants Administration and Technical Assistance
- State of Illinois Department of Commerce & Economic Opportunity – Grants System Business Process Improvement and Organizational Redesign
- University of Illinois Urbana-Champaign – Organizational Change Management Framework Development & Training

Mark J. Maraccini
CPA, CIA – Partner

901 S MoPac Expressway
Bldg. 2, Suite 450
Austin, Texas, 78746
mark.maraccini@crowe.com
www.crowe.com

Profile

Mr. Mark Maraccini is a lead partner for the Texas market and for providing risk mitigation and audit management services to governmental entities. Mark has been leading the Texas market for Crowe for 2 years now working with many State and Local entities throughout the State. Mark also has 24 years of experience working with public sector clients on risk management and compliance services and other audit related activities.

Risk Experience

Over the past 24 years, Mark has worked a plethora of governmental entities assisting either performing enterprise risk management, risk and control assessments and Initiative based risk assessments. Specifically, Mark has worked on risk related services with the Teacher Retirement System of Texas, Texas Department of Transportation, Texas Department of Information Resources, University of Texas System, and the Illinois Criminal Justice Authority, to name a few, This experience has provided him with a deep specialization in analyzing risks and compliance over various types of projects. This experience has also provided Mark with in-depth experience with COSO Internal Control and ERM frameworks and the ISO 31000 ERM framework.

Thought Leadership

Mr. Maraccini is also an industry trailblazer in thought leadership and is currently co-leading a public sector webinar series in conjunction with the IIA that provides quarterly webinars on current and trending topics for public sector auditors. In addition, Mark has recently presented at the 2023 Texas SAO Annual Conference on strategic risk assessments, 2022 IIA international conference on how to conduct DEI audits, developed two articles with the IIA on general audit issues in government and supply chain issues in a covid environment. In addition, Mark lead two sessions at the 2022 ALGA national conference on strategic risk assessments and risks common to local governments. Furthermore, Mr. Maraccini presented to the IIA Chicago chapter, the IIA Mexico National Conference and at the IIA international conference in 2019 on Building a Sustainable ERM program in the Public Sector. Lastly, Mr. Maraccini served on a panel for the IIA and Association of Government Accountants related to risks surrounding governmental internal audit division.

Client Focus

Services:

- Risk Management Services
- Enterprise Risk Management
- Risk and Control Assessments
- Subrecipient Monitoring
- Grant Management Consulting
- Compliance Audits
- Audit Readiness
- Finding Mitigation
- Performance Audits
- Financial Audits
- Internal Control Reviews
- Accounting Assistance
- Examinations

Industries:

- State Government
- Local Government
- Higher Education
- Not-for-Profit

Professional Affiliations:

- National Grants Management Association
- Texas CPA Society
- American Institute of Certified Public Accountants
- Association of Local Government Auditors (ALGA)
- Institute of Internal Auditors (IIA)
- IIA Austin Chapter, Audit and Finance Committee

Education:

- Bachelor of Arts, Accounting
  - DePaul University | Chicago, Illinois

Relevant Client Experience

Local Governments and Special Districts

- Chicago Teachers' Pension Fund
- Los Angeles County Employees Retirement Association
- San Diego County Employees Retirement Association
- Bi-State Development Authority
- City of Fort Worth, Texas
- City of Chicago, Illinois
- City of Indianapolis, Indiana
- City of San Diego, California
- City of Cincinnati, Ohio
- City and County of San Francisco
- Washington Metropolitan Area Transit Authority
- North County Transit District
- City of Greenwood, Indiana
- Nassau County, New York
- City of Long Beach, New York
- Health Care District of Palm Beach County, Florida
- Lake County, Illinois

State and Federal Agencies (excluding State Universities)

- Teacher Retirement System of Texas
- Texas Department of Transportation
- Texas Department of Information Resources
- California State Teachers Retirement System
- Illinois Emergency Management Agency
- Illinois Department of Central Management Services
- Illinois Department of Corrections
- Illinois Department of Health and Human Services
- Illinois State Board of Higher Education
- Illinois Department of Commerce and Economic Opportunity
- Utah Transit Authority
- Indiana State Department of Agriculture
- California Public Utility Commission
- Arizona office of the Auditor General
- National Credit Union Administration
- Special Inspector General of Afghanistan Reconstruction (SIGAR)
- US Department of Commerce
- US Department of Transportation – Federal Highway Administration

Education

- University of Texas System
- Chicago Public Schools
- DePaul University
- Northeastern Illinois University
- State University System of Florida
- University of Texas System
- Colorado State University System
- University of Maryland
- Ivy Tech Community College of Indiana
- Lake Forest College
- St. John's University
- Olivet University
- Los Angeles Unified School District
- Seattle Public Schools

Jill A. Willis
MBA, PMP, Prosci ® – Managing Director

Direct 312.606.7190
Cell 312.237.6552
jill.willis@crowe.com
www.crowe.com
Linked In profile

Profile

Jill Willis is a public sector specialist with over 20 years of professional experience working for nonprofit and government entities. Jill is an experienced Managing Director for Crowe's Consulting Public Sector Business Transformation Practice and leads the **Crowe Strategy Lab** offering. Jill has extensive knowledge of local government, non-profit management, budget and financial management and analysis, grants management, procurement, organizational development, strategic planning, organizational change management, training and coaching, and business process optimization. She is a highly analytical professional with excellent communication and leadership skills; with a track record for managing complex projects in a thorough, thoughtful manner.

Professional and Industry Experience

Jill has over two decades of experience in both the government and non-profit sectors. Before joining the Crowe team, she was the Chief Financial Officer for a prominent Chicago non-profit; where she led efforts to transform the finance, accounting, payroll, purchasing, IT, and facility departments. She is a highly analytical professional with excellent communication and leadership skills; with a track record for managing complex projects in a thorough, thoughtful manner. Additionally, Jill has a strong commitment to Chicago-area non-profits and seeks opportunities to volunteer her time whenever possible.

Publications & Speaking Engagements

- Article: How to Minimize Risk When Modernizing Public Safety Services
- Crowe's 2025 Not-for-Profit and Government Summit, Strategic Revenue Planning (presenter)
- CARES Act Lessons Learned & Next Steps for Grantees, National Grants Management Association (presenter)
- Managing Compliance with Federal Grant Programs, American Society for Public Administration (presenter)

Client Focus

Services:

- Public Sector Consulting
- Nonprofit Consulting
- Project Management
- Strategic Planning
- Stakeholder Engagement
- Organizational Assessment
- Organizational Leadership
- Organizational Change Management
- Training & Coaching
- Business Analysis, Process Reengineering
- Process & Procedure Documentation
- Grants Management (including Federal)
- Budget Analysis and Management
- Financial Management, Analysis & Modeling
- Enterprise Resource Planning
- RFP Development, Procurement Policies & Procedures

Industries:

- Public Sector – Local & State Government
- Nonprofit Organizations – Foundations, Education, Arts & Tourism, Youth, Health, and Non-Partisan

Professional Affiliations:

- Project Management Institute
- Prosci ®
- Association of Change Management Professionals
- PLAN Executive Advisory Board (PEAB) Member, Ball State University's Estinopal College of Architecture & Planning

Education & Certifications

- Project Management Professional (PMP) certification
- Prosci ® Certified Change Practitioner (CCP)
- Master of Business Administration
- Alliance Manchester Business School | Manchester, England, UK
- Bachelor of Urban Planning & Development
- Ball State University College of Architecture & Planning | Muncie, IN
- Bachelor of Science – Environmental Design
- Ball State University College of Architecture & Planning | Muncie, IN

Sample Public Sector Client Listing

Higher Education

University of Illinois – Urbana & Champaign, IL
Project Manager, Adaptive Change Management Framework

Chicago Public Schools – Chicago, IL
Project Manager, multiple initiatives for the Office of the CEO, Office of Management and Budget and Office for Diverse Learner and Support Services and Office of Internal Audit and Compliance.

Business and Financial Analyst, multiple financial transformation initiatives

Martin University – Indianapolis, IN
Project Manager, Comprehensive Organizational Assessment

Oberlin College – Oberlin, OH
Engagement leadership and Subject Matter Advisor, Finance & Administration Assessment

State & Local Government

Battery Park City Authority – New York, NY
Lead Business Analyst, Asset Management Assessment

City and County of Denver Department of Transportation and Infrastructure – Denver, CO
Lead Project Manager, Finance Administration Assessment

City of Birmingham – Birmingham, AL
Project Manager, Organizational Assessment, *City of Birmingham Performance Assessment*

City of Aurora – Aurora, IL
Project Manager, multiple projects under the IT PMO

City of Evansville – Evansville, IN
Engagement Leadership and Strategic Planning Advisor, Organizational Assessment and Strategic Plan,
City of Evansville Strategic Plan Press Release

City of Fort Wayne – Fort Wayne, IN
Project Manager, American Rescue Plan Act (ARPA) State & Local Fiscal Recovery Fund (SLFRF) Funding Support, City of Fort Wayne ARPA Recovery Plan

Cook County: Bureau of Asset Management – Cook County, IL
Project Manager, Assessment and Requirements Gathering for Enterprise Asset Management System Procurement

Hamilton County – Cincinnati, OH
Project Manager, American Rescue and Recovery Act's State and Local Fiscal Recovery Funds Support
Project Manager, Financial and Operational Assessment, Financial & Operational Assessment Phase 1 Report and Hamilton County Financial & Operational Assessment Summary

Illinois Department of Commerce & Economic Opportunity / Illinois Office of Tourism & Civic Consulting Alliance – Chicago, IL
Subject Matter Adviser, Funding Diversification Study

Lake County 911 Consortium Public Safety Software Modernization – Lake County, IL
Project Management Team Lead and Organizational Change Manager, Enterprise Public Safety Software Implementation Support, Project media release: https://content.govdelivery.com/accounts/ILLAKE/bulletins/3974c1d

Lake County Clerk's Office – Lake County, IL
Engagement Lead, Records Management Software Implementation Support

Office of the Nassau County Comptroller – Mineola, NY
Project Manager, Telecommuting Assessment
Project Manager, Revenue Assessment, Nassau County Sales Tax Revenue Analysis

Ohio Department of Job & Family Services – State of Ohio
Pandemic Response Team: Communications Pillar Strategy Lead, Pandemic Unemployment Support

Scott County Department of Information Technology – Davenport, IA
Engagement Lead, IT Application Assessment and Procurement Support
Project Manager, Jail Management System Procurement Support
Project Manager, Comprehensive Technology Assessment and Technology Strategic Plan, Scott County Board Presentation December 2023

State of IL Department of Commerce & Economic Opportunity – Springfield/Chicago, IL
Engagement Team Lead and Project Manager, Program Management and Technical Compliance for State of Illinois' Local CURE Support Grant Program. Local CURE includes CARES Act Coronavirus Relief Funds and the State's allocation of American Rescue and Recovery Plan (ARPA) State and Local Fiscal Recovery Funds (SLFRF) for Non-Entitlement Units (NEU), https://dceo.illinois.gov/cure.html

Not-for-Profit Organizations

Alzheimer's Assocation – Chicago, IL
Project Manager, Operational and Management Assessment and Cybersecurity Assessment

American Academy of Pediatrics – Itasca, IL
Project Manager, ERP Procurement and Implementation Support

California Wellness Foundation – Los Angeles, CA
Project Manager, Finance Assessment

Chicago Metropolitan Agency for Planning (CMAP) & Civic Consulting Alliance – Chicago, IL
Subject Matter Adviser, Regional Public Transit Board Support

Civic Federation of Chicago Strategic Planning – Chicago, IL
Project Manager, Strategic Plan, https://www.civicfed.org/StrategicPlan

Connecticut Conference of Mayors – New Haven, CT
Project Manager, CRM Assessment

DHR Health – Southern Texas
Subject Matter Advisor, Grant Playbook Development

Joyce Foundation – Chicago, IL
Project Manager, Organizational Assessment

Spencer Foundation – Chicago, IL
Project Manager, IT Assessment

YMCA of the USA – Chicago, IL
Project Manager, Organizational Spend Assessment

Prior Relevant Experience

After School Matters – Chicago, IL
Chief Financial Officer

Chicago Office of Tourism & Cultural Affairs – Chicago, IL
Director of Finance & Administration

City of Chicago, Office of the Mayor – Chicago, IL
Project Manager

City of Chicago, Office of Budget & Management – Chicago, IL
Senior Budget Analyst

Sharon Nelson
PMP, CCMP – Manager

Direct 916.266.9539
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Profile

Ms. Nelson is an experienced Manager in Crowe's Public Sector Consulting Services Group and is located in our Sacramento office. Ms. Nelson is a Prosci® Certified Change Management Practitioner and PMI® certified Project Management Professional (PMP) with over 22 years of consulting experience. She has extensive experience in OCM, Business Process Analysis and Reengineering, Project Management, Implementation Readiness and Support, Needs Assessments, and Training and Knowledge Transfer. Ms. Nelson has also managed many projects requiring RFP development, proposal analysis, vendor demonstrations, vendor selection, OCM, training, and system implementation.

Professional and Industry Experience

Ms. Nelson has extensive public sector experience in managing various large, complex, state, and local government and private sector information technology (IT) projects Ms. Nelson's OCM and experience and contributions have helped agencies overcome significant challenges to meet their strategic goals. She has demonstrated success in identifying and adapting to challenges to enable success.

Professional Affiliations

- Project Management Institute – Sacramento Valley Chapter

Education & Certifications

- Bachelor of Arts, Communication Studies
    - California State University, Sacramento | Sacramento, California
- PMI®-certified PMP - PMP Number: 2039630
- Prosci® Change Management Certification (CCMP) – Prosci®

Client Focus

Services:

- Organizational Change Management
- Program, project, and performance management
- Business Process Analysis
- Business Process Reengineering
- Program analysis and development
- Strategic business and technology planning
- Organizational assessment and redesign
- Communications and public outreach
- Training development and delivery
- Functional design, setup, testing, and technical documentation
- System design, development, implementation, and integration
- Requirements traceability
- Procurement support

Industries:

- Public sector

Representative Clients

- California Department of Water Resources
- Mississippi Department of Human Services (MDHS)
- Georgia Department of Family and Child Services (DFCS)
- California Department of Finance (FI$Cal)
- Mississippi Division of Medicaid
- California Department of Health Care Services
- Washington Health Benefit Exchange (WAHBE)
- California Office of Systems Integration (OSI)

Client Listing

California Department of Water Resources
Financial Management Enhancement Program
Role: Organizational Change Management Project Manager | Date: September 2019 – July 2026
As Organizational Change Management (OCM) Project Manager for the California Department of Water Resources (DWR) Financial Management Enhancement Program (FMEP), Ms. Nelson's role on this large, multi-project (4) program includes developing and applying organizational change management (OCM) techniques and methodologies to enable and support DWR to implement and adopt systems to improve efficiency and consistently produce financial plans that function in an integrated manner. She developed and implemented OCM strategies related to leadership and stakeholder management, communication management, business readiness, change network management, organization and work design, and training and support.
Ms. Nelson's current project management responsibilities include managing four (4) distinct workstreams supporting the implementation and ongoing operation of the four (4) systems included in the FMEP program. The workstreams are: 1) Project Management; 2) Assessment and Evaluation of System Adoption; 3) Long-term Training Strategy Development; and 4) Data Governance and Management Supporting Business Intelligence/Cross-Modular Reporting (BI/CMR) project.
She supported the development and implementation of a comprehensive data governance framework for SWP SAP financial systems, helping to establish a data governance structure and governance framework with roles, responsibilities, and timelines for managing SAP SWP financial data. She also supported the development of the SWP SAP Data Governance Plan, which outlines the responsibilities and processes for effective data governance and includes a timeline for the data governance activities.
As OCM lead Ms. Nelson is also leading rollout support activities for related systems and processes, such as identifying impacts to existing processes, forms, and staff, defining, and developing new process documentation, and developing an ongoing (post-implementation) training program to sustain, reinforce, and enable adoption of new systems.

Imperial County
ERP Business Analysis and Procurement Services
Role: Project Manager | Date: October 2023 – January 2025
As Project Manager, Ms. Nelson is leading activities to support Imperial County in procuring a new Enterprise Resource Planning (ERP) system. Specific activities included:

- Conducted a comprehensive assessment of the current technology environment to identify technology challenges, such as end-of-life and siloed systems, as well as considerations relating to system and data governance. The insights derived from this effort helped define the scope and direction of the ERP procurement activities.
- Developed a Technology Assessment Report that identified all the systems and tools used by the County and identify the systems and tools that would likely be in scope as part of the ERP procurement, as well as those that should be considered for integration with the new ERP.
- Conducted Industry Trends / Market Research: Based on information learned in the assessment, as well as staff interviews, focus groups, and documentation review, Ms. Nelson led efforts to determine:
    - Are there solutions available that address the County's needs?

  - Are there sufficient options for a competitive procurement process?
  - Who are the vendors that provide solutions in the local government market?
- Developed detailed system requirements and solicitation documents.
- Led the procurement process from development and release of RFP to proposal evaluation, vendor demonstrations, and vendor selection.

Multiple California Municipalities
Municipal Enterprise Resource Planning (ERP) Procurement
Role: Project Manager | Date: August 2018 – September 2019
As Project Manager, Ms. Nelson provided consulting services for the procurement of a new ERP for Financial, Human Resources, Utility Billing, and Land Management functions for municipalities including the City of Suisun, the City of Pleasant Hill, the City of Davis, the City of Dublin, and the Santa Clara County Housing Authority. The scope of these projects included RFP development, proposal analysis, vendor demonstrations, and vendor selection. Integrated within these project management and procurement activities are OCM activities, such as process improvement identification, analysis, and recommendations; and developing an approach to enable user adoption.

California Department of Health Care Services (DHCS)
FI$Cal Implementation Project
Role: Business Analyst | Date: January 2018 – June 2018
Ms. Nelson provided OCM, business analysis, and project management services for the FI$Cal Implementation Project at DHCS. She worked with multiple stakeholders, both inside and outside DHCS, to develop requirements, and document process changes, impacts, and strategies to improve the adoption of FI$Cal following implementation. Her responsibilities included:

- Documented as-is and to-be business processes related to FI$Cal
- Conducted gap analysis of as-is and to-be business processes, developed mitigation strategies, and enabled user adoption
- Maximized efficiencies, where possible, to reduce/eliminate redundant business processes
- Coordinated meetings with departmental stakeholders to discuss impacts and changes, and facilitated decision-making
- Provided briefings to DHCS management and prepared weekly status reports.

Mississippi Department of Human Services (MDHS)
Legacy Migration and Modernization Project, Phase 2
Role: Organizational Change Management Lead | Date: December 2016 – December 2017
The Legacy Migration and Modernization project migrates and re-platforms existing applications from a z/OS mainframe to Linux. As change management lead, Ms. Nelson planned and led change management activities, including:

- Developed the Organizational Change Management (OCM) Plan and managed related activities
- Developed the Knowledge Transfer strategy and created the Knowledge Transfer Plan
- Managed training and knowledge transfer activities, including working with system and internal resources to develop training content
- Designed and conducted an End User Needs Assessment, which was the foundation of OCM activities.

Mississippi Department of Human Services (MDHS)
MDHS Strategic Planning, Advisory, and Implementation Services Project
Role: Change Management and Transformation Consultant | Date: December 2016 – October 2017
The purpose of this project was to assist MDHS in conducting business and IT transformation services – from assessment to planning to implementation support. Ms. Nelson's role was to guide stakeholder management and communications, as well as conduct assessments and help develop an IT Strategic Plan.

California Department of Health Care Services (DHCS)
Provider Application and Validation for Enrollment (PAVE) Project
Role: Organizational Change Management Business Analyst | Date: May 2016 – November 2016
The automated PAVE solution allows DHCS to meet the requirements specified in the Patient Protection and Affordable Care Act (PPACA) and help DHCS reach a Medicaid Information Technology Architecture (MITA) maturity level of 3.0. The PAVE system is used by approximately 100 DHCS staff and more than 140,000 Medi-Cal providers. As OCM Business Analyst, Ms. Nelson was responsible for:

- Providing Business Process Re-engineering (BPR) expertise to the Provider Enrollment Division and the PAVE project to identify, define, and document business needs, opportunities, and objectives, and develop strategies for achieving the desired vision
- Identifying organizational and business process impacts resulting from the PAVE implementation
- Applying the ADKAR® methodology to assess users' readiness to adopt the changes resulting from the PAVE implementation and providing recommendations on activities to mitigate the impacts and prepare PAVE users to adopt the changes.

Mississippi Division of Medicaid
Interoperability Platform Consulting Services
Role: Organizational Change Management and Project Management Analyst | Date: July 2015 – November 2017
The Mississippi Division of Medicaid (DOM) engaged consultants to work on a series of priorities for the iTECH Division related to Interoperability and Health Information Technology (HIT) initiatives. Ms. Nelson's activities included:
Supporting the procurement of an Environmental Scan of Electronic Health Record (EHR), where she:

- Researched similar procurements in other states to identify best practices and lessons learned.
- Developed and documented the procurement strategy
- Developed the scope of work for the EHR Environmental Scan
- Developed technical and functional requirements for the EHR Environmental Scan.

She also helped iTECH develop its philosophy of project management, standardize its practices across its portfolio, and set the stage for more successful projects, which was named Strategic Project Portfolio Standardization (SPPS). Ms. Nelson's responsibilities included:

- Conducted an inventory and assessment of the project management tools in place, including interviews with PMs and maturity level assessments
- Conducted a visioning session with executive stakeholders to understand the vision for project management within the organization
- Developed and delivered Project Management training for iTECH project managers
- Led organizational change management (OCM) efforts, utilizing the ADKAR® methodology, to enable the successful adoption of the new project management standards, processes, and tools.

Georgia Department of Family and Child Services (DFCS)
Supplemental Nutrition Assistance Program (SNAP) CAP Sustainability Project
Role: Project Management Consultant | Date: June 2014 – February 2015
DFCS contracted with consultants to assist in implementing the recommendations contained in the Organizational Assessment for SNAP and its Food and Nutrition Services (FNS) Corrective Action Plan (CAP) Update that focused on long-term solutions to the business model, performance monitoring, and organizational effectiveness. The four work streams focus on the most critical factors for achieving long-term sustainability in improved SNAP application processing: Project Management Office (PMO) Services, Data Management and Performance Monitoring, Leadership Effectiveness, and Strategic Advisory Services. Ms. Nelson's responsibilities included:

- Supported DFCS in its effort to create a Project Management Office (PMO)
- Assisted in the development and implementation of standard project management tools and templates

- Mentored DFCS Project Managers in project execution, and using tools and templates
- Conducted assessment of case assignment process to identify opportunities for process improvement.

Washington Health Benefit Exchange (WAHBE)
Customer Service Optimization Assessment (CSOA)
Role: Process Improvement Consultant | Date: February 2014 – May 2014

As part of a team of consultants, conducted an enterprise-wide assessment that included a review of root causes of customer calls, a review of the end-to-end customer experience identifying touch points across the experience, an assessment of the organizational structure, business processes, systems, and tools in terms of customer service and accountability.

- Interviewed WAHBE staff and identified customer self-service opportunities
- Compiled and analyzed data and information to make objective recommendations
- Identified ways to reduce wait times
- Developed content and created a consolidated roadmap of customer experience enhancement initiatives and information and made objective recommendations.

L.A. Care Health Plan
Claims Training Program
Role: Training Consultant | Date: December 2013 – May 2014
L.A. Care Health Plan engaged consulting support to develop a comprehensive and well-structured Claims Department training program for new and current claims examiners. Prior to this effort, disparate training programs were used by the various claims' units. To improve accuracy and consistency, a single, comprehensive training program was required.

- Conducted interviews with L.A. Care subject matter experts (SME) to gain an understanding of the claims process
- Reviewed existing training materials and system documentation to understand system functionality
- Developed classroom training materials (PowerPoint), student and instructor guides, and evaluation tools.

California Department of Finance (DOF)
Financial Information System for California (FI$Cal) Project
Role: Knowledge Transfer and Training Consultant | Date: November 2012 – November 2013
The FI$Cal project is a business transformation project for state government in the areas of budgeting, accounting, and procurement. FI$Cal implemented Oracle's PeopleSoft and Hyperion Planning and Budgeting solutions statewide across 100+ state departments and agencies, including four Control Agencies: DOF, State Controller's Office (SCO), State Treasurer's Office (STO), and Department of General Services (DGS). To support FI$Cal end users and project staff, Ms. Nelson was part of the change management team managed knowledge transfer activities and developed training materials, and delivered training to prepare end users to use FI$Cal.

- Analyzed FI$Cal business processes and designed and developed training materials to support those business processes for FI$Cal end users (state department staff)
- Worked closely with FI$Cal business and technology teams to gain an understanding of FI$Cal business processes and the FI$Cal technical environments
- Designed end-user training materials using Oracle's User Productivity Kit (UPK) developer tool
- Managed knowledge transfer activities to transfer skills and knowledge from FI$Cal system integrator staff to state FI$Cal project staff
- Collected and analyzed data monthly to measure and track that the necessary knowledge base had been transferred to the FI$Cal project state staff
- Coordinated and oversaw Oracle-delivered PeopleSoft training to FI$Cal state staff

- Delivered end-user training on the FI$Cal system to end users from FI$Cal and state departments.

California Office of Systems Integration (OSI)
Case Management Information and Payrolling System II (CMIPS II) Implementation Project
Role: Implementation/Change Management Lead | Date: May 2008 – November 2012
CMIPS II—a $400-million, multi-year project—is a payroll- and case-tracking system for California's in-home care programs, which pay out $4 billion per year for services to the aged, blind, and disabled. As Implementation Lead, Ms. Nelson performed activities to support California County's transition to CMIPS II.

- Created a repeatable strategy and templates to support the implementation of CMIPS II in all 58 California counties, California Department of Social Services (CDSS) Adult Programs Division (APD), and CDSS Accounting
- Conducted business process gap analysis; worked directly with each assigned implementation site (counties and CDSS APD) to identify the impacts of CMIPS II on each county's and APD's specific business processes
- Supported county validation of converted data; reported, analyzed, and recommended resolution strategies for converted data issues
- Applied the ADKAR® methodology to develop and implement change management plans; led activities at each assigned implementation site to develop a specific change management plan, which utilized the ADKAR® methodology and presented the major organizational and business differences, identified possible options for enabling change, and presented tools and templates to support both organizational and business change activities
- Managed the communications workgroup; developed and implemented the Communications Plan; guided activities to develop consistent messages and guidance for all CMIPS II implementation sites
- Led activities at each assigned implementation site to develop a specific communications plan for the implementation of CMIPS II

Genevieve Carter
MPA, PMP – Manager

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Profile

Genevieve is a Manager in Crowe's Strategy & Management Advisory Public Sector business unit. She has over 7 years of experience working with government clients on process improvement, technology procurement and implementation, organizational change management, and policy review.

Professional and Industry Experience

Genevieve is well-versed in state and local government administrative policy and procedure, and has performed a wide variety of organizational assessments and facilitated process improvement initiatives. She has experience managing internal change and process improvement projects, and expertise in municipal financial policy and process analysis.

Professional Affiliations

- Project Management Institute
- Scrum Alliance

Education & Certifications

- Master of Public Affairs
  - LaFollette School of Public Affairs | University of Wisconsin
- Bachelor of Arts
  - School of Journalism & Mass Communications | University of Wisconsin
  - Political Science | University of Wisconsin
- Project Management Professional (PMP) Certification
  - February 2023
- Scrum Master Certification (SMC)
  - September 2024

Client Focus

Services:

- Government Financial Management
- Government Procurement
- Project Management
- Strategic Planning
- Policy Analysis
- Process Analysis, Mapping, and Redesign
- Requirements Gathering
- RFP Development
- System Implementation

Industries:

- Public Sector
- State and Local Government
- Public Utilities
- Non-Profit

Community Involvement:

- Madison Public Library Board Member
- City of Madison Elections Official
- Girls on the Run Coach | SC Wisconsin

Recent Client Listing

City of Aurora, IL – 311 Transformation Project

Role: Project Manager

Working with the City to manage a complete 311 transformation, including the procurement and implementation of new 311 technology. Leading the development of knowledge base articles, solution workflows, and multiple integrations to GIS and phone systems. The 311 transformation project also includes the development of a new physical space, hiring new customer service staff, and rewriting current customer service policies and processes.

City of Huber Heights, OH – Process Assessment and ERP Procurement

Role: Project Manager

Assessed current state processes and developed recommendations for future state. Lead the development of functional and technical requirements, and developed procurement documentation for an enterprise solution including finance, HR, payroll, timekeeping, utility billing, and tax management functionality. Leading the procurement process for the City, including vendor selection, interviews, and contract negotiations.

State of California Department Developmental Services (DDS) – Process Assessment, Financial Solution Procurement, and Implementation Planning

Role: Project Senior Consultant

Lead process analysis of current and future state business processes. Conducted workflow and requirements development for future solution implementation preparation. Assisted with procurement process, developing RFI and RFP documentation for the Department. Project is aligned with the California Department of Technology's Project Approval Lifecycle (PAL) Process.

City of Aurora, IL – Records Retention Strategy Development and Procurement Assistance

Role: Project Manager

Developed a records retention and digitization strategy for all historical records for the Clerk's office. Facilitated stakeholder meetings, assess gaps in IT infrastructure, and develop strategy documentation. Developed functional requirements for technology solution.

State of California Department of Resources Recycling and Recovery (DRRR) – Enterprise IT Assessment and Procurement Assistance

Role: Project Senior Consultant

Conducted an IT gap analysis to determine system deficiencies and needs and assess functional needs for future enterprise system. Conducted market research and develop procurement documentation.

State of Illinois Governor's Office of Management and Budget (GOMB) – ARPA Reporting

Role: Deputy Project Manager

Maintained financial and programmatic reporting data for state agencies utilizing ARPA funding under federal guidelines. Administered SharePoint site for agencies, conduct reporting training for agency representatives, and maintain project management documentation for ongoing project support.

Additional Experience

Government Finance Officers Association:

City of Olympia, WA – Process Improvement, Organizational Assessment, ERP Procurement, and Implementation Assistance
Role: Project Senior Consultant
Guided the City through a full-scale process and policy analysis project with proposed process improvements and process mapping. Assisted in the development of functional requirements for an Enterprise Resource Planning (ERP) financial solution. Developed RFP documentation and facilitated procurement process for ERP solution. Provided implementation assistance through the implementation of the ERP solution.

Thurston County, WA – Process Improvement, Organizational Assessment, ERP Procurement, and Implementation Assistance
Role: Project Senior Consultant
Guided the County through a full-scale process and policy analysis project with proposed process improvements and process mapping. Assisted in the development of functional requirements for an Enterprise Resource Planning (ERP) financial solution. Developed RFP documentation and facilitated procurement process for ERP solution. Provided implementation assistance through the implementation of the ERP solution.

Butte County, CA – Process Improvement, Organizational Assessment, ERP Procurement, and Implementation Assistance
Role: Project Senior Consultant
Facilitated process mapping, analysis, and discussion for future state process and policy decisions. Worked with County staff to implement process and policy changes. Assisted the County with procurement of new ERP solution. Provided oversight and project management activities through the implementation of new ERP solution for County staff and leadership.

City of Littleton, CO – Process Improvement, Organizational Assessment, ERP Procurement, and Implementation Assistance
Role: Project Manager
Facilitated process mapping, analysis, and discussion for future state process and policy decisions. Worked with County staff to implement process and policy changes. Assisted the City with procurement of new ERP solution. Provided oversight and project management activities through the implementation of new ERP solution for City staff and leadership.

City of Aurora, CO – Process Improvement, Organizational Assessment, ERP Procurement, and Implementation Assistance
Role: Project Senior Consultant
Facilitated process mapping, analysis, and discussion for future state process and policy decisions. Worked with County staff to implement process and policy changes. Assisted the City with procurement of new ERP solution. Provided oversight and project management activities through the implementation of new ERP solution for City staff and leadership.

Glendon Haney
Client Principal

Profile

Mr. Haney is a Principal focused on the Public Sector with over 12 years of professional experience in operational and information technology consulting, including ERP implementations, business process improvement and development, and packaged software implementations. Mr. Haney has a strong background in finance, accounting and auditing.

He has extensive knowledge around the Microsoft Dynamics platform and the full life cycle implementation process. Mr. Haney focuses exclusively on consulting within Crowe's Public Sector Dynamics practice.

Public Sector Industries

- Transportation Authorities
- Airport Authorities
- State and Local Government

Functional Expertise

- Accounts Payable
- Accounts Receivable
- Budgeting
- Cash & Bank Management
- General Ledger
- Expense Management
- Financial Reporting
- Fixed Assets
- Inventory
- Procurement & Sourcing
- Projects & Grants
- Debt Management

Microsoft Dynamics Public Sector ERP Experience

Mr. Haney has been a Dynamics Solution Architect, Implementation Lead and Project Manager across the Microsoft Dynamics Public Sector ERP customers listed below. All customers are live, and Crowe was the prime vendor responsible for implementing each of these customers – including the full implementation life cycle, data conversion and integration to other systems, unless otherwise noted.

- **City of South Bend, IN – Project Manager, Solution Architect**
  Modules implemented include General Ledger, Financial Reporting, Budgeting, Procurement & Sourcing, Accounts Payable, Cash & Bank Management, Projects & Grants, Accounts Receivable, and Fixed Assets.
- **Indianapolis Public Transportation Corporation – Project Manager, Solution Architect**
  Modules implemented include General Ledger, Financial Reporting, Budgeting, Procurement & Sourcing, Accounts Payable, Cash & Bank Management, Projects & Grants, Accounts Receivable, Fixed Assets and Inventory.
- **Milwaukee County Transit System – Solution Architect**
  Modules implemented include General Ledger, Financial Reporting, Budgeting, Procurement & Sourcing, Accounts Payable, Cash & Bank Management, Projects & Grants, Accounts Receivable, Inventory, and Asset Management. Implementation currently in progress.

- **Port of Tacoma – Solution Architect**
  Modules implemented include General Ledger, Financial Reporting, Budgeting, Procurement & Sourcing, Accounts Payable, Cash & Bank Management, Projects & Grants, Accounts Receivable, Fixed Assets and Debt Management.
- **Tulsa International Airport – Solution Architect**
  Modules implemented include General Ledger, Financial Reporting, Budgeting, Procurement & Sourcing, Accounts Payable, Cash & Bank Management, Fixed Assets and Product Information Management. Integrated with Civix AirportIQ Business & Revenue Manager.
- **Virginia Passenger Rail Authority – Solution Architect, Implementation Lead**
  Modules implemented include General Ledger, Financial Reporting, Budgeting, Procurement & Sourcing, Accounts Payable, Cash & Bank Management, Projects & Grants, Accounts Receivable, Fixed Assets and Expense Management.
- **Louisville Regional Airport Authority – Solution Architect, Implementation Lead**
  Modules implemented include General Ledger, Financial Reporting, Budgeting, Procurement & Sourcing, Accounts Payable, Cash & Bank Management, Projects & Grants, Accounts Receivable, Fixed Assets, Inventory and Expense Management. Integrated with Civix AirportIQ Business & Revenue Manager.
- **Montgomery County, OH – Implementation Lead**
  Modules implemented include General Ledger, Financial Reporting, Budgeting, Procurement & Sourcing, Accounts Payable, Cash & Bank Management, Projects & Grants, Accounts Receivable and Fixed Assets.
- **Kenosha County, WI – Implementation Lead**
  Modules implemented include General Ledger, Financial Reporting, Budgeting, Procurement & Sourcing, Accounts Payable, Cash & Bank Management, Projects & Grants, Accounts Receivable and Fixed Assets.
- **Metra Rail (Chicago) – Implementation Lead**
  Modules implemented include General Ledger, Financial Reporting, Budgeting, Procurement & Sourcing, Accounts Payable, Cash & Bank Management, Projects & Grants, Accounts Receivable, Fixed Assets, Inventory and Payroll. Crowe also implemented a D365 Revenue Accounting solution.

Mr. Haney also served as a Senior Audit Associate for the following public sector entities:

- City of Ft Worth, TX
- Village of Franklin Park, IL
- Village of Glendale Heights, IL
- Village of Elmwood Park, IL
- Pace Suburban Bus
- Prairie State College
- South Suburban College
- Ilinois State Board of Education

Education

University of Illinois – Champaign-Urbana, IL
Bachelor of Science in Accountancy

Hyerine Kim

Dynamics Implementation Lead

Profile

Ms. Kim is an experienced Dynamics Implementation Consultant with over 4 years of experience with Dynamics ERP and deep expertise in the financial and operational modules of this solution.

She leads all aspects of the implementation including business requirement gathering/process review, system configuration, functional specification design, system validation, training, and support. Ms. Kim focuses exclusively on consulting within Crowe's Public Sector Dynamics practice.

Public Sector Industries

- Utilities
- Transportation Authorities
- Airport Authorities
- State and Local Government

Licenses & Certifications

- D365 Finance and Operations Functional Consultant Associate

Functional Expertise

- Accounts Payable
- Accounts Receivable
- Budgeting
- Expense Management
- Fixed Assets
- Procurement & Sourcing
- Projects & Grants

Microsoft Dynamics Public Sector ERP Experience

Ms. Kim has been a Dynamics Implementation Lead and Specialist across the Microsoft Dynamics Public Sector ERP customers listed below. All customers are live, and Crowe was the prime vendor responsible for implementing each of these customers – including the full implementation life cycle, data conversion and integration to other systems, unless otherwise noted.

- **San Jacinto River Authority – Implementation Lead**
  Modules implemented include General Ledger, Financial Reporting, Budgeting, Procurement & Sourcing, Accounts Payable, Cash & Bank Management, Projects & Grants, Accounts Receivable, Fixed Assets and Inventory. Crowe also developed a customer portal for licensing and permitting.
- **Louisville Regional Airport Authority – Implementation Lead**
  Modules implemented include General Ledger, Financial Reporting, Budgeting, Procurement & Sourcing, Accounts Payable, Cash & Bank Management, Projects & Grants, Accounts Receivable, Fixed Assets, Inventory and Expense Management. Integrated with Civix AirportIQ Business & Revenue Manager.
- **Tulsa International Airport – Implementation Lead**
  Modules implemented include General Ledger, Financial Reporting, Budgeting, Procurement & Sourcing, Accounts Payable, Cash & Bank Management, Fixed Assets and Product Information Management. Integrated with Civix AirportIQ Business & Revenue Manager.
- **Hampton Roads Transit – Implementation Specialist**
  Modules implemented include General Ledger, Financial Reporting, Budgeting, Procurement & Sourcing, Accounts Payable, Cash & Bank Management, Projects & Grants, Accounts Receivable, Fixed Assets and Inventory.

- **Charleston Water System – Implementation Specialist**
  Modules implemented include General Ledger, Financial Reporting, Budgeting, Procurement & Sourcing, Accounts Payable, Cash & Bank Management, Projects & Grants, Accounts Receivable and Fixed Assets.

Ms. Kim also worked with a number of other Dynamics ERP customers:

- TD Industries, TX
- Orion Marine Group, TX

Education

Georgia Institute of Technology, Scheller College of Business
Bachelor of Science in Business Administration

Sciences PO, Campus de Reims
Certification in Business and Economics

Sadir Zarook, CBAP
Finance & Compliance Manager

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Profile

Mr. Zarook is a Manager in the firm's Public Sector Consulting Practice. He leads projects in the project manager role as well as supporting projects through business requirement gathering, technical/functional specification design, system architecture, and training.

Professional and Industry Experience

Mr. Zarook has extensive experience in project management, technology implementations, and business process optimization across multiple industries, including public sector, hospitality, and energy. With expertise in technology implementation projects, lease accounting, business process design, and automation, he has successfully led ERP implementations, financial reporting transformations, and process reengineering initiatives.

His leadership in project and stakeholder management has been instrumental in driving successful digital transformations, supporting alignment of strategic goals and long-term sustainability.

Professional Affiliations

- Project Management Institute (PMP)
- Certified Business Analysis Professional (CBAP)

Education & Certifications

- Bachelor of Science, Accounting
  - Rutgers University – Rutgers Business School, NJ
- Certificate in Business Analytics
  - Wharton Business School (Executive Ed Program)

Client Focus

Services:

- Project Management
- Technology Implementations
- Lease Accounting
- NetSuite ERP
- Business Process Design & Automation
- Business Process Reengineering
- Robotic Process Automation
- Review Process Design

Industries:

- Public Sector
- Hospitality
- Energy

Client Listing

Employees' Retirement System of Rhode Island | NetSuite ERP Implementation Project

Role: Functional Lead/Manager | May 2023 – Present

Crowe is currently engaged with the Employees' Retirement System of Rhode Island (ERSRI) to implement various Oracle NetSuite modules to support the system's financial and reporting needs.Crowe is enaged to assist in all phases of the implemenation project which includes preparation, execution,validaion, deployment and support.

City of Los Angeles, Comptroller's Office | Self Assessment of Internal Control of Financial Reporting

Role: Survey Technical Lead/Manager | July 2023 – February 2024

Crowe was engaged with the Comptroller's Office for the City of Los Angeles to create a survey in Microsoft Power Platform to assess the internal controls of the various departments under the purview of the Comptroller's office. Crowe is enaged to assist in all phases of the survey life cycle which includes the creation, distribution, management and analysis of survey responses.

Washington DC Office of Inspector General (DC OIG)

Evaluation of oversight programs under DC OIG

Role: Survey Technical Lead/Manager | Date: May 2023 – September 2023

Crowe was engaged with the District of Columbia Office of the Inspector General (OIG) to conduct a survey and perform an evaluation of oversight programs at District departments, agencies, and commissions. Many District offices perform management oversight functions through various activities, yet structure, functions, and standards may vary. Crowe is supporting the DC OIG to understand which District agencies maintain oversight functions as well as their governance and reporting structures.

Niagara Frontier Transportation Authority
GASB 87/96 – NetSuite Crowe Lease Accounting Optimizer Implementation Project
Role: Implementer/Project Manager | Date: November 2022 – April 2023
Crowe was engaged by Niagara Frontier Transportation Authority, NY to perform lease abstraction work and implement the Crowe Lease Accounting Optimizer for GASB 87/96 reporting needs.

City of Long Beach, NY
GASB 87/96 Lease Abstraction and Implementation Project
Role: Project Manager | Date: October 2022 – December 2022
Crowe was engaged by the City of Long Beach, NY to review the relevant contracts, perform calculations on the initial measurements, prepare journal entries and footnote disclosures under GASB 87/96 standards.

University System of New Hampshire
GASB 87/96 – NetSuite Crowe Lease Accounting Optimizer Implementation Project
Role: Implementer/Project Manager | Date: March 2022 – July 2022
The University System of New Hampshire engaged Crowe to implement the Crowe Lease Accounting Optimizer for GASB 87/96 reporting needs.

Muckleshoot Indian Tribe – Fixed Assets Module
NetSuite Fixed Asset Module Implementation Project
Role: Implementer/Project Manager | Date: January 2022 – March 2022
The Muckleshoot Indian Tribe engaged Crowe to implement the Fixed Asset Module in NetSuite to manage and improve business processes to support a portfolio of more than two thousand fixed assets.

Muckleshoot Indian Tribe – Lease Accounting System

GASB 87/96 – NetSuite Crowe Lease Accounting Optimizer Implementation Project

Role: Implementer Manager | Date: August 2021 – December 2021

The Muckleshoot Indian Tribe engaged Crowe to implement the Crowe Lease Accounting Optimizer for GASB 87/96 reporting needs.

University of Florida Health

GASB 87/96 – NetSuite Crowe Lease Accounting Optimizer Implementation Project

Role: Implementer Manager | Date: August 2021 – March 2022

The University of Florida Health engaged Crowe to implement the Crowe Lease Accounting Optimizer for GASB 87/96 reporting needs.

Venture Global LNG

Oracle NetSuite to SAP S/4 HANA Re Implementation Project

Role: Senior Manager| Date: April 2020 – April 2021

Managed the fixed assets and project costs of a mid-scale modular LNG plant at an energy start-up to supply low-cost liquid natural gas to the global energy market. Served as a key stake holder in the design, development, and configuration phases of the Asset Management + Project System Modules in SAP S/4 HANA as part of a 6-month ERP Implementation Project. Participated with IT Partners on daily scrum meetings so that any impediments were addressed, cleared and backlogs were completed on time to achieve sprint goals.

HMS Host Corporation

PSFIN 9.1 Lease Administration and Asset Management Implementation Project

Role: Senior Manager| Date: January 2007 – April 2020

Managed the plan to retire life cycle of all tangible, intangible & right of use assets (ROU) for F&B North America + Retail locations (120+ stores) at HMSHost. Supervised three direct reports who supported controllers in operations on asset management projects which includes implementation, configurations, upgrades, and enhancements in 9.4 Peoplesoft Financial Module. Collaborated with the real estate accounting team to implement the Peoplesoft Lease Accounting Module to manage and report on ROU assets valued at USD $1.2 Billion under ASC 842 and IFRS16 accounting methods.

Olivia Knarr
Business Transformations - Consulting Staff

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Profile

Ms. Knarr joined Crowe in August 2023 as a Staff Consultant for the Public Sector Business Transformations team, serving education, non-profit, and state and local government entities. She has a Bachelor of Science degree in Policy Analysis.

Professional and Industry Experience

Ms. Knarr's work experience includes:

- Crowe LLP, Technology and Business Transformation Staff
  - Indianapolis, Indiana (Present)
- Ohio Department of Education & Workforce
  - Columbus, OH (Present)
- California's Department of Resources Recovery & Recycling
  - Sacramento, CA (October 2024 – January 2025)
- City of Huber Heights
  - Huber Heights, OH (February 2024 – January 2025)
- District of Columbia Court of Appeals
  - Washington, D.C. (July 2024 – November 2024)

Through her work experience, Ms. Knarr has worked across state government agencies, including their internal and external stakeholders, on projects focused on moving the respective agency forward in their mission. Her work has focused on assessments, procurement, business process redesign, and implementation support. These diverse roles have allowed her to develop a robust skillset, continually expanding and refining her capabilities to help clients reach their goals.

Education & Certification

- B.S. Policy Analysis
  - Indiana University | Bloomington, IN
- Entry Certification in Business Analysis (ECBA)
  - International Institute of Business Analysis, IIBA

Client Focus

Services:

- Business Process Mapping & Redesign
- Communications Management
- Compliance
- Data Collection & Analysis
- Market Analysis
- Microsoft Dynamics 365
- Organizational Change Management
- Policy Analysis
- PMO Implementation
- Public Procurement
- Requirements Gathering
- Risk Assessment
- RFP Development
- Software Procurement
- Stakeholder Engagement
- Training Development and Delivery

Industries:

- Public Sector
- Economic Development
- Education
- Courts
- Local Government

Client Listing

Ohio Department of Education & Workforce, Procurement Compliance Reviews
Role: Analyst | *Date: January 2024 – Present*
Ms. Knarr serves as a business analyst conducting Procurement Reviews for school food authorities throughout the state of Ohio. Support includes assessing compliance with federal and state requirements for competitive procurements, including the analysis of 50+ school procurement policies, procedures, and contract documentation. Ms. Knarr collaborated with schools to develop corrective action plans that ensure compliance and prevent future occurrences.

California's Department of Resources Recovery and Recycling (CalRecycle), Enterprise System Implementation
Role: Analyst | *Date: October 2024 – January 2025*
Ms. Knarr served as a business analyst on the $30 million CalRecycle Integrated Information System (CRIIS) Project, a SaaS enterprise system replacement initiative designed to consolidate 31 separate systems supporting the state's recyclable materials infrastructure and administration into a single, streamlined solution. Support included attending requirements discovery sessions for system implementation, facilitating business process redesign, tracking and managing action items, and meeting with subject matter experts to ensure project alignment and progress.

City of Huber Heights, Enterprise Software Procurement
Role: Analyst | *Date: February 2024 – January 2025*
Ms. Knarr served as a business analyst for software procurement assistance, market research, and business process mapping. Support included gathering requirements, creating requirements validation surveys, and developing solicitation documentation to promote the successful procurement and implementation of enterprise resource planning software. Conducted business process mapping sessions to identify inefficiencies in the City's policies and processes.

District of Columbia Court of Appeals, Organizational Change Management for System Implementation
Role: Analyst | *Date: July 2024 – November 2024*
Ms. Knarr served as the business analyst for an organizational change management project to implement a new case management system. Support included developing comprehensive change management plans that addressed people, processes, and technological aspects of change.

Indiana Department of Workforce Development (DWD), PMO Implementation & Organizational Change Management
Role: Analyst | *Date: May 2024 – October 2024*
Ms. Knarr served as a business analyst for the implementation of DWD's project portfolio management office. Support included conducting stakeholder focus group sessions, assessing the current state and maturity of the organization, and creating standardized tools, templates, and processes. Ms. Knarr provided change management expertise, including a readiness assessment and the development of comprehensive change management plans.

Indiana Department of Health, State Trauma Plan
Role: Analyst | *Date: November 2023 – August 2024*
Ms. Knarr served as the business analyst for the development of Indiana's first statewide trauma system plan. Conducted best practice research by evaluating leading state trauma plans and publications as well as federal guidance. Leveraged research to develop trauma system plan recommendations. Engaged stakeholders, administered a statewide survey, and facilitated stakeholder feedback sessions with trauma experts to validate, refine, and prioritize recommendations. Developed Indiana's trauma system plan which the Trauma Care Commission voted unanimously to adopt.

Indiana Economic Development Corporation, CRM Training Development
Role: Analyst | *Date: September 2023 – May 2024*
Ms. Knarr served as a business analyst for the development of a multi-level training guide for Microsoft Dynamics 365 including text, images, and videos. Attended daily meetings to provide status updates on training development. Collaborated with the internal team and client to revise training guides to ensure a high-quality learning experience.

Lake County, Illinois, Records Management Procurement
Role: Analyst | *Date: August 2023 – March 2024*
Ms. Knarr served as a business analyst for research and software procurement assistance. Support included market analysis and vendor souring to promote the successful implementation of records management digitization. Developed solicitation documents, assisted project team evaluation, and supported contract negotiations with the selected vendor.

Indiana Department of Workforce Development (DWD), GAP Analysis
Role: Analyst | *Date: September 2023 – January 2024*
Ms. Knarr served as a business analyst for the systems assessment and development of a technology roadmap within workforce development. Support included designing a current state assessment of the information technology infrastructure, documenting best practices across the business process, and creating a roadmap to move from the current state to a future state with key strategic items identified.

Illinois Governor's Office of Management and Budget, ARPA Reporting & Compliance
Role: Analyst | *Date: September 2023 – January 2024*
Ms. Knarr served as a business analyst for the management, administration, tracking, and reporting of expenditures related to the American Rescue Plan Act State and Local Fiscal Recovery Funds awarded to the State of Illinois by the U.S. Department of Treasury. Support included preparing internal and external training to meet Federal grant compliance reporting standards, scheduling team meetings, attending agency office hours, and business process mapping. Facilitated internal retrospective to identify opportunities for improvement.

Hans Callanan
Public Sector Strategy –
Consulting Strategy Analyst

Chicago, Illinois
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Profile

Mr. Callanan is a Public Sector Strategy Analyst specialized in strategy and compensation analysis, committed to delivering on clients' needs by contributing knowledge in procurement, business, and financial analysis. He also helped lead the integration and overhaul of the Annual Crowe Compensation and Benefits Survey, delivering faster results, improved user experience, and more meaningful data collection.

Professional and Industry Experience

Mr. Callanan brings extensive experience delivering classification and compensation studies for public sector clients, contributing to streamlined organizational structures and competitive workforce strategies. He has supported state and local government agencies in conducting large-scale analyses, including total compensation benchmarking, pay disparity evaluations, and compliance reviews. In addition to his expertise in public sector strategy, Mr. Callanan has a strong background in project management, data analysis, and risk documentation, enabling him to provide actionable recommendations that drive measurable results. His ability to navigate complex projects and deliver tailored solutions ensures alignment with client objectives and long-term organizational success.

Education & Certification

- Bachelor of Science in Economic Consulting and Sustainable Business, Concentration in Political Science
    - Indiana University, Kelley School of Business | Bloomington, IN
- Bank Solutions Provider Certification | American Bankers Association

Client Focus

Services:

- Public Sector Consulting
- Business Analysis
- Project Coordination
- Digital Transformation
- Compensation Analysis
- Classification Analysis
- Strategic Planning
- Process Mapping
- Core Banking System Studies
- Financial Crimes
- Procurement

Industries:

- City, County, & State Government
- Financial Services
- Banking

Client Listing

Chicago Metropolitan Agency for Planning (CMAP) – Chicago, Illinois
Engagement & Equity Campaign
Role: Consultant | Date: August 2024 – Current
Mr. Callanan is building a dynamic and comprehensive engagement dashboard to display county engagement data, tracking the client's progress against established benchmarks. Utilizing Excel and Microsoft Forms, he ensures the dashboard is functional and insightful for internal and external review and analysis. He also assists in developing and executing project management tools and templates to streamline project processes. Additionally, he supports the preparation and facilitation of project status and committee meetings. Through these efforts, Mr. Callanan contributes to the effective management and execution of the project's objectives.

Doctors Hospital at Renaissance, Ltd. (DHR Health) – Rio Grande Valley, Texas
Grant Management Roadmaps & Implementation
Role: Consultant | Date: August 2024 – Current
Mr. Callanan is defining goals, objectives, and a desired timeline for two grants totaling $100 million. He is documenting the established grants management structure, controls, and workflows at DHR Health. Mr. Callanan is also identifying priority activities, such as financial and programmatic reporting requirements and monitoring. Additionally, he is pinpointing grant management policies, procedures, and resources necessary for data collection, monitoring, and reporting. He outlined and drafted two comprehensive reports that will serve as roadmaps for DHR Health's post-award grant management.

Ohio Department of Education and Wellness (ODEW) – Columbus, Ohio
Procurement Complaince Reviews
Role: Consultant | Date: December 2023 – Current
Mr. Callanan executes USDA-mandated procurement reviews for school food authorities throughout the State of Ohio. He manages over two dozen school reviews, liaises with school representatives, reviews procurement and contract documentation, and assesses compliance with federal and state requirements for competitive procurements – including analysis of school procurement policies, procedures, and contract documentation. Mr. Callanan works with each school to oversee the completion of corrective actions to mitigate areas of non-compliance.

Oregon Department of Environmental Quality
Old Corrugated Containers Sensitivity Analysis Study
Role: Consultant | Date: July 2024 – November 2024
Consultant to perform strategic analysis for the Oregon Department of Environmental Quality (OR DEQ). The project encompassed a thorough evaluation of processing costs, contamination management strategies, and financial returns, leading to the calculation of both base and anticipated program costs (additional costs to compliance requirements and investments required to meet future capture and contamination rate standards). These costs incorporated essential factors such as living wages, employee benefits, and performance standards required by the Recycling Modernization Act. In addition, Crowe determined statewide average commodity values (ACV) for commingled materials to help establish consistent and transparent fee structures. Mr. Callanan conducted quality control on reviewing the cost model regarding the sensitivity of OCC (Old Corrugated Containers) within the Oregon recycling system.

State of Illinois Department of Central Management Services (CMS) – Chicago, Illinois
Classification & Compensation Study
Role: Consultant | Date: August 2024 – Current

Mr. Callanan supports a multi-year engagement to conduct a statewide classification and compensation analysis. The analysis covers over 1,100 union and non-union classifications within the State of Illinois, focusing on streamlining, consolidating, or updating the classification structure. It also includes a comprehensive total compensation benchmarking analysis, a pay disparity analysis, and several other targeted evaluations. He assists in gathering labor market intelligence and data to support the workforce goals of CMS. Mr. Callanan is in the process of reviewing CMS classifications to ensure alignment with the broader labor market and exploring improved methods for classifying positions. His efforts contribute to maintaining a competitive stance with other employers and developing strategies for attracting and retaining qualified employees.

Michigan Economic Development Corporation (MEDC) – Lansing, Michigan

Classification & Compensation Study

Role: Consultant | Date: August 2024 – Current

Mr. Callanan assists with the job analysis, job evaluation, and market compensation analysis for 150 distinct titles employed by MEDC. He helps update the organization's compensation philosophy, classification titles, job titles, and compensation system. He is utilizing accepted practices in the management and design of compensation systems, ensuring compliance with applicable federal and state laws. Mr. Callanan is performing job analyses for all positions within the organization to evaluate job context, content, qualifications, and performance criteria. He is also reviewing the existing list of job-specific skills by functional job family to confirm the accuracy of skill names and definitions based on new position descriptions. Additionally, Mr. Callanan is involved in reviewing and updating job descriptions to align with the revised compensation framework.

California State Auditor's Office – Sacramento, California

Classification & Compensation Study

Role: Consultant | Date: July 2023 – October 2023

Mr. Callanan served as a compensation analyst for a Total Compensation Analysis. He researched and aggregated data, analyzed client classifications, benchmarked compensation and benefits offered against five other government entities, and documented the results of the analysis in the Final Compensation Report. He crafted recommendations and considerations to support the client in reaching workforce goals.

Crowe Compensation & Benefits Survey – Chicago, Illinois

Compensation & Benefits Survey Development

Role: Consultant | Date: May 2023 – August 2023

Mr. Callanan led the transformation of the Crowe Compensation Survey between platforms, updated survey questions, conducted quality & compatibility tests, collaborated across teams, and served as a survey subject matter expert.

Water Resources Foundation (WRF)

Strategic Planning and Risk/Quality Management Documentation

Role: Consultant | Date: November 2023 – February 2024

Mr. Callanan consulted with the Foundation to support its efforts in organizing and evaluating internal research program guidelines. He used a risk matrix and mitigation strategy tool to map and track the processes used by the WRF, allowing the client to gauge and evaluate these practices more effectively.

Mr. Callanan also wrote up and reviewed risk/quality documentation of these maps to allow for WRF employees to better follow and understand the maps.

North Salem State Bank – Indianapolis, Indiana

Strategic Planning & Management

Role: Consultant | Date: August 2023 – October 2023

Mr. Callanan supported the bank's strategic planning and management initiative by developing the board agenda, identifying key stakeholders to discuss, and creating a digestible report for future benchmarking.

Celero – Calgary, Alberta

Digital Banking Vendor Selection

Role: Consultant | Date: January 2023 – March 2023

Mr. Callanan assisted Celero, a data processing and technology services provider, in finding a software company vendor by researching 10 vendors, analyzing the RFP's/offerings, assessing strengths and weaknesses, and creating a meaningful report with a ranking system. Celero secured a proven software engineering vendor with extensive .NET and banking application dev/ops credentials.

Casey Koenig
Staff Consultant

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www.crowe.com

Profile

Ms. Koenig is a consultant in Crowe's Public Sector Business Transformation services group. Ms. Koenig holds a Bachelor's of Science in Finance and Economics from Creighton University and is a Certified Associate in Project Management.

Professional and Industry Experience

Ms. Koenig returned to Crowe full-time in August 2023 following her successful internship with the firm. While at Crowe, Ms. Koenig has worked with multiple state- and local-level government clients. Her background includes strategic planning, procurement support, stakeholder engagement, grants management, technology assessments, and financial research and analysis. She also has experience working in the criminal justice system, facilitating communication across various law enforcement agencies and upholding chain of custody evidence procedures.

Education & Certifications

- Bachelor of Science in Business Administration
    - Heider College of Business | Creighton University
    - Finance & Economics | Philosophy minor
- Certified Associate in Project Management (CAPM) – Project Management Institute, Inc.

Client Focus

Services:

- Data Analysis
- Financial Analysis
- Organizational Chain Management
- Policy Analysis
- Process Analysis, Mapping, and Redesign
- Procurement Support
- Project Management
- Strategic Planning
- Systems Implementation

Industries:

- Public Sector

Community Involvement

- American Foundation for Suicide Prevention, Out of Darkness | Omaha, NE
- Munroe Meyer Institute | Omaha, NE
- Project Ride | Elk Grove, CA

Recent Client Listing

Delaware Valley Regional Planning Commission (DVRPC) Department of Human Resources Compensation Study
Role: Business Analyst | *Date: January – March 2025*
Crowe is conducting a market compensation study to assess DVRPC's level of market competitiveness as it related to employee compensation. Along with the Crowe team, Ms. Koenig is reviewing DVRPC's job descriptions and job family structures, analyzing market data, conducting market pricing analysis, and provided DVRPC with recommended pay ranges.

City of Bloomington (Indiana) Department of Human Resources
Union Compensation Study
Role: Business Analyst | *Date: January – March 2025*
Crowe is executing market pricing analysis and developing recommendations for compensation ranges for a subset of City positions represented by the AFSCME labor union. Along with the Crowe team, Ms. Koenig is analyzing market and City data, developing a report of the market results, and providing the City with recommendations to re-align grades.

Scott County (Iowa)
IT Application Assessment
Role: Business Analyst | *Date: December 2024 – March 2025*
Crowe is conducting an IT Applications Assessment to evaluate the dependencies across applications, including those used by the Human Resources and Finance teams, in response to Scott County's pending need to replace the current time and attendance software due to a planned deprecation by the vendor. As part of this assessment, Crowe is inventorying human resource and workforce management applications and identifying system interdependencies, high-level operational needs, core areas for process improvements, and high-level business requirements for the County's forthcoming procurement process. Ms. Koenig is leading the project's stakeholder engagement, facilitating focus group sessions with 13 County departments and offices, as well as supporting project management activities and the development of the assessment report.

Cook County (Illinois) Bureau of Finance
Grant Infrastructure Optimization
Role: Business Analyst | *Date: July 2024 – December 2026*
Crowe is facilitating the redesign of Cook County's grants management processes and governance structures to gain greater efficiencies. As part of this engagement, Crowe is analyzing current business processes, redesigning processes based on leading practices and stakeholder input, developing uniform grants policies and procedures, and completing a lost-funding opportunity analysis. After these activities, Crowe will develop comprehensive training curricula and materials and will facilitate training for personnel in offices throughout the County. Ms. Koenig is supporting work across the project's five workstreams, including the development of draft project deliverables, facilitation of stakeholder interviews and focus groups, process mapping, and support of ongoing project management activities.

Civic Federation (Illinois)
Strategic Planning
Role: Facilitator | *Date: August 2024*
Crowe developed a strategic plan for the Civic Federation, an independent, non-partisan government research organization, to support the Civic Federation's mission of providing objective research, analysis, and recommendations for the Chicago region and State of Illinois.

Ms. Koenig assisted in the facilitation of Crowe's Strategy Lab, where stakeholders from various member firms and organizations participated in an interactive visioning session to experiment with ideas related to board governance, funding strategy, policy development, and organizational reach.

California Office of Energy Safety
Forensic Audit
Role: Analyst | *Date: February 2024 – Present*
Crowe conducted a forensic independent performance audit on behalf of the Office of Energy Infrastructure Safety, in accordance with the Generally Accepted Government Auditing Standards (GAGAS), of regulated Investor-Owned Utilities' (IOUs) to determine compliance with reporting rules and regulations. Ms. Koenig identified and analyzed vegetation management initiatives and supporting data to assess compliance for five IOUs.

Ottawa County (Michigan) Parks and Recreation Commission (OCPRC)
Strategic Planning
Role: Business Analyst | *Date: November 2023 – July 2024*
Crowe developed a strategic plan to serve as a compass for the OCPRC through its next phase of development and service, driving the direction, thinking, and organizational structure when delivering services to park goers and other stakeholders. The plan leveraged the County's unique geographic position and community support for parks investment. Crowe engaged with various stakeholders, including the County Commission, parks personnel, and the public, for a diverse perspective, using the Crowe Strategy Lab to craft OCPRC's mission, vision, values, and priorities. Crowe also provided OCPRC with a recommended implementation approach to align staff with updated organizational roles and responsibilities. The strategic plan was used by OCPRC to showcase community benefits in preparation for a millage to continue parks funding. As the Business Analyst, Ms. Koenig drafted all project deliverables and assisted in the conducting of stakeholder engagement workshops and the Crowe Strategy Lab.

Franczek P.C. on behalf of Confidential Public Sector Client
Pay Adjustment Implementation Support
Role: Business Analyst | *Date: September 2023 – March 2024*
Crowe provided analysis and documentation to assist a large municipality in implementing adjustments to employee compensation. Adjustments were negotiated by the client with its labor unions and subject to approval by the client's governing body. Ms. Koenig assisted with providing analysis, draft calculations, and draft documentation to assist the client in its labor negotiations and governance processes. After approval, the Crowe team provided analysis and draft documentation to assist the client in implementing changes to pay rates. At the conclusion of Crowe's engagement, Ms. Koenig assisted in the deliverance of a procedure manual and templates as well as led training in key procedures to client personnel to transition knowledge back to the client and build capacity for executing processes.

St. Joseph County (Indiana) Office of Clerk of the Circuit Court
Financial Operational Assessment
Role: Business Analyst | *Date: October 2023 – January 2024*
Crowe conducted an organizational assessment of the Office to identify opportunities to streamline operations and maximize efficiencies in the areas of people, processes, and technology. Crowe reviewed current control standards, current bank reconciliation processes, current cash handling procedures as well as conducted interviews with stakeholders to better understand the environment of the Office. Ms. Koenig coordinated communication amongst the stakeholders, drafted all project deliverables, including the development of high-level business process maps and position descriptions, reviewed and analyzed the Office's documentation, and assisted with conducting interviews.

California Department of Pesticide Regulation (DPR)
Mill Fee Study
Role: Research Analyst | *Date: June – August 2022*
Crowe was tasked with conducting a study on the DPR's mill assessment to assess its existing structure and rate and the current and future revenues produced by the mill assessment's structure and rate. The study culminated in detailed mill options that incentivize the use of safer pest management and provide long-term sustainable funding for DPR. As part of the study process, Ms. Koenig assisted in an array of program research relating to national and state-wide pesticide use and sales data. She designed formal brochures and graphics that communicated project updates to the various stakeholders and the public.

California Department of Public Health (CDPH)
Microsoft Dynamics Solutions
Role: Business Analyst | *Date: June – August 2022*
CDPH retained Crowe to develop and implement multiple MS Dynamics applications for a variety of programs across the department. Ms. Koenig provided quality assurance and development validation for CDPH's COVID-19 Testing Application portal.

California Environmental Protection Agency (CalEPA)
CERS NextGen
Role: Business Analyst | *Date: July – August 2022*
The California Environmental Reporting System (CERS) NextGen project replaced the existing reporting system with a scalable, cloud-based solution that better aligns with regulatory requirements and stakeholder needs. Ms. Koenig provided procurement support for CalEPA by compiling a synthesized report of the responses to the client's Request for Information (RFI). She presented this analysis to CalEPA to assist in the development of the project's scope of work, contractor qualifications, and evaluation criteria.

Additional Experience

Sacramento County District Attorney's Office
Role: Investigative Intern | *Date: May – August 2021*
Ms. Koenig coordinated communication between deputy district attorneys and ten law enforcement agencies across Sacramento and Yolo counties. She upheld procedures relating to chain of custody for original pieces of evidence and initiated state and multi-statewide background checks on individuals to support trial cases across multiple divisions, including Human Trafficking, Domestic Violence, and Career Criminals.

Monae Evans
MSc, PMP – Manager

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Profile

Monae is a Manager with Crowe's Public Sector Strategy and Management Advisory team. She has over 6 years of project management, policy development, and strategic planning experience which she has gained throughout her time at Crowe and prior non-profit and city government experiences. Monae's Public Sector consulting experience includes organizational change management, implementation planning, business process improvement, strategic planning, and compensation and classification analysis. She is also a PMI-certified Project Management Professional.

Professional Experience

Ms. Evans has notable experience related to state and local government policy analysis and development. She is also well-versed in organizational change management and strategic planning experience while working on various client engagements at Crowe. Monae has assisted clients in executing change readiness assessments and implementing effective business process improvements.

Prior to joining Crowe, Ms. Evans worked with local government agencies and non-profit leaders to support the design and execution of large-scale public service initiatives during her time at the NYC Mayor's Office.

Education & Certifications

- Master of Science, Public & Urban Policy Analysis
  - The New School | New York City, New York
- Bachelor of Arts, Political Science, International Affairs
  - Gettysburg College | Gettysburg, Pennsylvania
- Project Management Professional (PMP) Certification
  - December 2023

Client Focus

Services:

- Business Process Mapping
- Compensation and Classification Analysis
- Compliance Audit
- Market Research
- Microsoft Cloud Products
- Organizational Change Management
- Organizational Assessments
- Project and Portfolio Management
- Strategic Planning
- System Implementation
- Strategy Implementation Support

Industries:

- Public Sector
- City, County and State Government
- Not-for-Profit

Relevant Project Listing

State of Illinois | Central Management Services – Classification and Compensation Study
Role: Project Manager
Monae manages the project team and serves as the main point of contact for the Central Management Services (CMS) team. She leads the team in executing a detailed classification and compensation analysis of 1,100 job classifications/titles. Key project activities include supporting the development of a multivariate research framework for the compensation analysis, facilitating stakeholder interviews and workshops, conducting quality control reviews of the marking pricing and benchmarking analysis, and developing and managing project management tools (including the Project Charter, Schedule, Status Reports, and Budget).

Indiana Department of Workforce Development – Project Portfolio Management Office Implementation and Organizational Change Management
Role: Project Coordinator/ OCM Subject Matter Specialist
Monae coordinates project activities to support the Department of Workforce Development (DWD) in establishing a new Project Portfolio Management Office (PPMO). She assists the team's Project Manager in executing an organization-wide current state assessment, change readiness assessment, and developing a PPMO implementation roadmap. As an OCM subject matter expert, Monae also leads change management assessment activities and the development of change management plans, including stakeholder management, communications, resistance management, and training plans. Her role also includes managing the project schedule, scope, and budget and facilitating weekly status meetings with the client.

City of Bloomington – Compensation and Classification Strategic Planning and Market Analysis
Role: Lead Business Analyst
Ms. Evans served as the lead business analyst in the development of a strategy related to workforce compensation and classification, including a market analysis and recommendations for updating the City's classification and compensation ranges for approximately 168 non-union positions. Project activities included market research on employee benefits, review and analysis of current job descriptions and pay data for in-scope positions, market analysis and research into peer organizations' compensation ranges, external benchmarking analysis, and supporting the Crowe team on stakeholder strategy meetings. Following this initial work, Monae and the project team assisted the City in the strategic planning and implementation of proposed classification and compensation changes.

New Jersey Economic Development Authority – iDMS Next Generation Power App Implementation
Role: Business Analyst
Monae supported the technical implementation team in the design and delivery of the Power App & Power Pages solution which allows users to manage a wide range of programs and services that offer tax credits, financial assistance, and incentives to New Jersey businesses. Monae's role included gathering business requirements, drafting user stories, performing QA testing, and implementing updates to user stories for the development team.

District of Columbia Court of Appeals – Organizational Change Management
Role: Lead Business Analyst
Monae served as a business analyst in the development of an Organizational Change Management Plan for the District of Columbia Court of Appeals in light of the Courts' new Case Management System implementation. This role included assisting in the development of a change readiness assessment, preparing materials for stakeholder interviews, focus groups, and a staff survey, conducting qualitative and quantitative data analysis on assessment responses, and summarizing key findings and recommendations in the Change Readiness Assessment and Organizational Change Management Plan.

California State Auditor's Office – Total Compensation Study
Role: Lead Compensation Analyst
Monae served as the lead compensation analyst in the development of a total market compensation analysis for the California State Auditor's Office's 36 full-time job classifications. Monae's role included assisting in the selection of benchmark positions and identification of comparable peer data sources, collecting, and analyzing both publicly available compensation data and published salary surveys, conducting external market benchmarking analysis, and summarizing key findings and recommendations in the Final Compensation Report.

YMCA of Greater New York – CRM Implementation
Role: Business Analyst
Monae served as a business analyst to support the implementation of YMCA's new CRM system. Her role included reviewing YMCA product offerings, programs, and membership services; drafting process maps of current state business operations with guideance from YMCA leadership and department heads; presenting process maps to YMCA leadership and department heads for feedback, and documenting potential improvements to the organization's business processes. The project team utilized the 30+ process maps to report current state operations to the vendor and identify areas of potential future state improvements.

California Department of Community Services and Development – Program Compliance Audit
Role: Business Analyst
Ms. Evans assisted with auditing the expenditures of energy utility companies participating in the California Arrerage Payment Program (CAPP). Project activities included review and analysis of utility customers' arrearage data and extracting sample data, evaluating whether CAPP benefits were applied in accordance with CAPP Program requirements and comparing CAPP benefits with arrearage totals, and reviewing utility company internal controls to ensure alignment with CAPP process.

Private Foundation – New York/ New Jersey – Compensation Review and Analysis
Role: Business Analyst
Monae supported the development of a compensation review and analysis of the Foundation's top leadership positions. Project activities included a review and analysis of organizational charts, job descriptions, and total compensation details for the positions under analysis. Monae also conducted external market research on peer organizations, benchmark analysis, and drafted a final summary report of the results.

Civic Consulting Alliance & Chicago Metropolitan Agency for Planning – Regional Transit Analysis Support
Role: Business Analyst
Ms. Evans supported the Chicago Metropolitan Agency for Planning (CMAP) in constructing a briefing book on the future of regional transit, considering the long-standing effects of the COVID-19 pandemic. Project activities included research gathering, analysis of travel demand models and scenarios, summarizing notable highlights, and presenting relevant findings in a briefing book. The goal of this project was to incite further action among key stakeholders through analyzing the economic, equity, and climate impacts of transit cuts and the risks involved in failing to address transit issues.

Helen Dickey, CPA, CISA
Founder & Partner, Harris & Dickey, LLC

Helen Dickey is an executive leader with over 40 years of experience in the consulting and banking industries serving as an executive, external auditor, internal auditor, and accountant. Together with Kelly Harris, she founded Harris & Dickey, LLC, a certified woman-owned professional services firm in Dallas, Texas in 2010. They believed that with a passion for delivering value and excellence to clients, they could create a unique firm of experienced leaders with a passion for over-delivering and delighting clients. Now, over 13 years later, Harris & Dickey is a successful professional services firm known for quality, customized consultative services in accounting, finance, internal audit, technology, project management, and special project assistance, primarily delivering services to companies in the Dallas/Fort Worth area. Previously, Ms. Dickey was an executive at Jefferson Wells, a major professional services firm, and she has worked in the financial institutions industry at Bank of America and Comerica Bank in accounting and internal audit. In addition, she was with Pricewaterhouse Coopers as well as KPMG.

Ms. Dickey currently serves on the Audit Committee Chairperson of the Board of the University of Texas at Arlington. She also serves on the Board of Governors for the Dallas Chapter of the Institute of Internal Auditors. She is a member of the Institute of Internal Auditors and Information Systems Audit and Control Association. Ms. Dickey graduated from the University of Texas at Austin and holds a CPA and CISA certification.

Matthew Glover

MANAGING DIRECTOR – TECHNOLOGY ERP CONSULTANCY

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Executive Summary

A seasoned and dynamic technology leader with 30+ years of experience in Enterprise Resource Planning (ERP) implementation, technology strategy, and cross-functional team leadership across the public and private sectors.

My foundation in the US Submarine Force instilled a mission-focused approach to modernizing complex systems, optimizing business processes, and delivering scalable and secure technology solutions. I have led high-impact ERP transformations, championed AI/ML innovations, and pioneered best-in-class SaaS and e-commerce platforms—resulting in robust business outcomes and streamlined operations. My collaborative style and user-centric mindset ensure ERP projects consistently align with organizational goals, drive operational efficiency, and maintain compliance with industry and governmental standards.

Experience

Global-CIO | Managing Director **2023 – Present**

Key Contributions:

- *Strategic Service Development: Conceptualized and launched a Fractional CIO business, offering tailored IT leadership to SMEs lacking dedicated IT executives.*
- *Fractional ERP Advisory: Conceptualized and launched a Fractional CIO service offering that includes ERP consulting, helping small and medium enterprises optimize or modernize their existing ERP landscapes.*
- *Cross-Industry ERP Expertise: Advised on SaaS-based ERP solutions for finance, manufacturing, government, and retail sectors, focusing on compliance, customizations, and scalability.*
- *Cross-Industry Expertise: Delivered IT strategy and guidance across diverse sectors, including SaaS, ERP, AI/ML, government, finance, manufacturing, and retail, ensuring industry-specific best practices.*
- *Stakeholder Collaboration: Established collaborative relationships with business leaders, understanding unique challenges and ensuring IT strategies align with business goals.*
- *Resource Optimization: Created a flexible model that allowed companies to leverage high-level IT expertise without the overhead of a full-time executive salary.*
- *Risk Management: Guided businesses in identifying, assessing, and mitigating IT risks, ensuring business continuity, and safeguarding critical data.*

Le-Vel Brands | Chief Technology Officer **2015 – 2023**

Key Contributions:

- *ERP & E-Commerce Integration:* Spearheaded integration between e-commerce platforms and ERP financial modules, facilitating real-time sales reporting and inventory control across multiple cloud environments.
- *Data Analytics & BI for ERP:* Established ERP-driven analytics platforms, defining KPIs to proactively detect anomalies in supply chain processes, customer support, and financial reporting.
- *Scalable Operations:* Deployed ERP-based processes for mobile-centric user experience, ensuring same-day shipping and reduced friction in order management and warehouse tracking
- *Innovative Architectural Transition: Multi-Cloud Architecture*: Implemented advanced microservices to connect ERP data with BI dashboards, enabling a 360° view of supply chain performance, promotions, sales and operational analytics.

- *Team Building and Agility:* Handpicked and cultivated an elite, agile technology unit, streamlining workflows and spurring an annual business surge in the hundreds of millions.
- *Strategic Techno-Business Alignment:* Harmonized technological roadmaps with overarching business objectives, ensuring a symbiotic realization of immediate requisites and progressive aspirations.
- *Platform Modernization:* Revolutionized our core platform, optimizing back-office functionalities and augmenting user experience, particularly for the mobile-centric demographics.
- *Customer-Centric Technological Leadership:* Maintained a staunch customer-first approach in project rollouts, staying at the vanguard of emergent technological trends.

Key Achievements:

- *Data-Driven Decision Making:* Detected a rise in Customer Support ticket, pinpointed a shipping challenge, and enhanced customer experience by curtailing shipping-related incidents by over 90%.
- *Industry Recognition:* Earned distinction as a Tech-Titans Corporate CTO of the Year finalist for consecutive years (2016 & 2017), exemplifying a pioneering "Cloud Business First" approach.
- *Sales Tool Impact:* Spearheaded the deployment of a daily sales planning tool, catalyzing an astounding 246% growth in user sales.
- *Market Expansion Mastery:* Ventured into untapped multilingual markets, ramping up sales by tens of millions annually, while adhering to PCI and GDPR benchmarks. Enhanced market reach through Twilio innovation.
- *Operational Excellence:* Elevated system performance metrics by over 200%, reinforcing our commitment to a same-day shipping promise.
- *Customer Outreach Triumph:* Innovatively leveraged social media campaigns, accelerating customer acquisition rates by 2600%, amassing 10M patrons.
- *System Resiliency:* Demonstrated resilience by doubling system production capacity amidst an impressive 7% monthly business uptick.
- *AI-Driven Fraud Prevention:* Realized significant savings by pioneering an AI-backed fraud detection mechanism, autonomously identifying and quarantining dubious transactions.
- *Cybersecurity Fortification:* Implemented state-of-the-art cybersecurity defenses, including SIEM and DDOS countermeasures, ensuring industry-leading system uptime and swift threat neutralization.

AMX by Harman | Chief Information Officer **2012 – 2015**

Key Contributions:

- *Growth Catalyst:* Pioneered a vision and roadmap, synchronized global teams, and launched novel solutions, turbocharging business growth via strategic acquisitions.
- Consolidated ERP & CRM Infrastructure: Orchestrated the integration of 5 acquired entities into a unified manufacturing ERP (JD Edwards / Oracle) and CRM (Dynamics) platform—simplifying inventory management, order processing, and financial reporting.
- Standalone Process Reviews: Led business process reviews to document current pain points and create more streamlined end-to-end workflows prior to each ERP rollout or enhancement.
- *Strategic M&A Integration:* Unified ERP modules Seamlessly integrated 5 enterprises, culminating in a unified system to enhance the agility of global finance, procurement, and logistics, enabling real-time data visibility and synergy in post-merger operations.
- *Global BI Platform:* Deployed a business intelligence solution to merge data from multiple ERPs, offering a single source of truth for leadership decisions on supply chain optimization and sales forecasting.
- *Cultural Shift:* Transitioned the technology team's narrative from a "NO" stance to a resounding "YES!" ethos.
- *Service Excellence:* Transformed a previously passive team into trusted business allies in nine months, and founded a dedicated Service Delivery team to foster deeper business collaborations.
- *Real-time Analytics:* Pioneered a visually-rich, actionable analytics system, providing a holistic view of global supply chains, sales, and logistics.
- *Intimate Tech Insights:* Initiated a "Day-in-the-Life" campaign, immersing tech teams in user experiences, sparking notable tech enhancements and innovations.
- *Unified Infrastructure:* Streamlined and centralized the firm's network domain, boosting market agility and simplifying business project executions.

Key Achievements:

- *Unified Business Insights:* Sculpted a state-of-the-art business intelligence platform, offering a consolidated view of company performance across a myriad of ERPs. (JD Edwards, Oracle and others)

- *Global Mobile Revolution:* Rolled out a groundbreaking B2B mobile interface for global sales interactions, spotlighted at Microsoft CIO summits (2013-2014).
- *E-Commerce Pioneer:* Introduced interactive click-to-chat for e-commerce and advanced a deeply integrated marketing automation suite, amplifying marketing efficiency without additional resources.
- *Fortified Cybersecurity:* Reinforced global cyber defenses, achieving a sixfold drop in vulnerabilities, fortified by advanced IDS and IPS systems.
- *Network Optimization:* Unveiled a cutting-edge global network, enhancing bandwidth by 305%, achieving cost savings, and supercharging download speeds by over 540%.
- *Cost-Efficient Virtualization:* Realized 85% production virtualization, translating to a global maintenance cost savings of $575k per annum.
- *Globalized Support:* Established a global service desk, elevating helpdesk satisfaction scores from 60% to 93% globally.
- *Agile Excellence:* Championed the Agile-Scrum approach to surge ahead in cloud services, clinching several accolades for groundbreaking innovations. (Office 365 / SharePoint and many others)

Bank of America | Senior Vice President (SVP) – Technology (Mortgage Servicing) 2004 – 2011

Key Contributions:

- *M&A Unprecedented FinTech Consolidation:* Orchestrated the transformation of the largest loan servicing portfolio in US history, culminating in the integration of America's foremost loan servicing platform during a challenging housing market.
- *Largest Loan Servicing Integration:* Drove a multi-year ERP and financial systems consolidation, merging Bank of America's and Countrywide's mortgage portfolios. Oversaw 1.2M+ change hours with strict compliance to federal and state regulations.
- *Enterprise-Wide Risk Management:* Championed secure role-based access controls and configurable approval workflows within ERP systems to reduce regulatory and operational risks.
- *Process Standardization:* Implemented best practices for financial management, cash application, and billing within the mortgage ERP environment, drastically reducing manual interventions.
- *Leadership at Scale:* Steered multiple teams ranging from 20 to 250 professionals, along with SVPs and VPs, within a vast matrixed organization comprising developers, QA specialists, and project managers.
- *Decision-making Catalyst:* Presided over the Executive Steering Committee and Release Champions Council, championing transparency and collaborative enterprise-wide decision-making.
- *Strategic Execution:* As the central figurehead for the Home Loans division, supervised the planning and implementation of projects worth over $1B, ensuring a seamless deployment of 1.2M change hours.
- *Risk Management:* Championed a balance between risk aversion and timely market delivery, adeptly managing a $55MM budget.
- *System Stability:* Fostered the development of stable, reliable systems through change control and event planning.
- *Architectural Innovator:* Galvanized the Office of Architecture into the company's pinnacle application development entity.
- *Operational Excellence:* Incepted best practices, standardized processes, and fostered seamless communication between development teams and consumers.

Key Achievements:

- *Historic Delivery:* Successfully rolled out the world's largest loan servicing platform, encompassing 12M+ loans. This monumental task involved merging Bank of America's and Countrywide's platforms, achieving a 500% cost reduction per loan.
- *Defect Management:* Realigned policies, risk oversight, and executive transparency, plummeting defects by 370% year-on-year and drastically cutting production incidents by over 700%.
- *Operational Efficiency:* Spearheaded a comprehensive development initiative that consolidated four credit fulfillment applications, boosting efficiencies by 120%, and delivering an ROI in five months.
- *Project Excellence:* Crafted and helmed a Project Management Office for a fresh Bank of America division, ensuring all software architecture projects were executed within stipulated budgets and timelines.
- *Data Security Pioneer:* Overlooked the "DataShield" initiative, encrypting sensitive information, pinpointing anomalous behaviors, and shielding customers from potential fraud and identity theft.

Intuit | Senior Program Manager	**2003 – 2004**
Hewlett-Packard | Senior Project Manager	**2002 – 2003**
Brown & Toland | Systems and Networks Manager	**2000 – 2002**
US Naval Submarine Force | Information Systems Manager	**1990 – 2000**

Education

Hawaii Pacific University, Dual Degree BS/BA Engineering / Management **1999**
Major: Computer Information Systems | Major: Business Management (Cum Laude)

Hawaii Pacific University, ASBA **1999**
Major: Marketing | Major: Economics | Major: Finance | Major: Accounting (with Honors)

Hawaii Pacific University, ASCS **1999**
Major: Computer Science (with Honors)

Board Positions and Leadership Roles

Distinguished Appointment by NSF (National Science Foundation): Member and NVC (National Visiting Committee) for the National Information Technology Innovation Center (NITIC)

- *Handpicked by the NSF for expertise and entrusted with:*
    - *Guiding NITIC's trajectory aligning with tech trends.*
    - *Facilitating annual performance reports to the NSF.*
    - *Championing and disseminating NITIC's milestones and achievements.*
- *A contributor to the Advanced Technological Education (ATE) program, ensuring resiliency and nationally relevant educational outcomes.*

Member, NSF's (AI) Artificial Intelligence - Business Industry Leadership Team
- *Co-leading the development of AI curriculum for U.S. educational institutions, emphasizing workforce readiness and collaboration with the Department of Labor.*

Former Chairman, NSF's National Convergence Technology Center - Business Industry Leadership Team
- *Maintained Chairman position for nearly 10 years until the program was sunset.*
- *Directed curriculum strategies for over 100 U.S. educational institutions, emphasizing workforce readiness and collaboration with the Department of Labor.*
- *Championed diversity in tech, promoting the inclusion of women, minorities, and veterans.*

Former Member, White House Office of Science & Technology - CTO Round Table
- *Served on a premier council of tech and HR experts, fostering educational programs that diversified tech workforce demographics.*
- *Pivotal in the TechHire Initiative, emphasizing versatile tech education routes, from coding bootcamps to traditional degrees, addressing the U.S. tech talent vacuum.*