



STATE OF NEW JERSEY  
DIVISION OF PURCHASE AND PROPERTY

**PROGRAM AND PROCESS MANAGEMENT AUDITING,  
FINANCIAL AUDITING AND GRANT MANAGEMENT, AND  
INTEGRITY MONITORING/ANTI-FRAUD SERVICES FOR  
DISASTER RECOVERY ASSISTANCE (HURRICANE SANDY)**

**RFQ768892S**

**TECHNICAL PROPOSAL**

**SUBMITTED BY:**

***Customer Value Partners***  
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**CUSTOMER  
VALUE PARTNERS**

**SUBMITTED TO:**

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**APRIL 8, 2013  
10:00 A.M. ET**

*This proposal includes data that shall not be disclosed outside the Government and shall not be duplicated, used, or disclosed—in whole or in part—for any purpose other than to evaluate this proposal. If, however, a contract is awarded to this Offeror as a result of—or in connection with—the submission of this data, the Government shall have the right to duplicate, use, or disclose the data to the extent provided in the resulting contract. This restriction does not limit the Government's right to use information contained in this data if it is obtained from another source without restriction. The data subject to this restriction are contained in Appendix A and Appendix B of the Technical Proposal and in the Cost Proposal.*

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## 1. EXECUTIVE SUMMARY

Customer Value Partners (CVP) is pleased to submit our response to the State of New Jersey Request for Quotation (RFQ) for Program and Process Management, Financial Auditing and Grant Management, and Integrity Monitoring/Anti-Fraud Services for Disaster Recovery Assistance related to Hurricane Sandy. We are submitting a single proposal to address all three pools specified in the RFQ.

CVP is highly qualified and well prepared to assist the State of New Jersey by delivering a wide variety of services associated with disaster recovery. Our experience in managing and administering disaster recovery funds is highlighted by our multi-year, multi-program support of the **\$5.4B CDBG-DR funds management and disbursement program** in Mississippi stemming from the largest natural disaster to hit our country – Hurricane Katrina. We also assist the State of Tennessee on their CDBG-DR economic and recovery assistance program efforts for flood and storm damage incurred in 2010. Our staff also has experience in the administration of FEMA temporary housing and individual assistance programs in Mississippi and as FEMA responders to disasters throughout the United States.

We are amongst a handful of firms that have had the opportunity to support state and local governments in administering a large scale program to get grants into the hands of the community for housing, economic development, and restoration of infrastructure. We are amongst an even smaller number of firms that can claim to have been instrumental in driving a highly successful long-term recovery program.

### Our Understanding

Given the recent occurrence of the disaster, the State of New Jersey has moved with unprecedented speed to submit its recovery plans and begin the process of getting long term recovery programs out to individuals, local governments and businesses. CVP has had discussions with various New Jersey representatives to understand the unique issues that they are facing in administering monies associated with the recovery effort. The scope of the programs for this disaster recovery effort is very large and requires the state to obtain turnkey support for

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### *CVP at a Glance*

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- *Significant and Successful Experience in disaster recovery program management for Mississippi and Tennessee Recovery efforts*
- *Successful history in providing oversight for other contractors*
- *Deep knowledge of Federal agency guidelines and compliance requirements*
- *Successful experience with FEMA disaster response and early recovery efforts for housing and individual assistance programs*
- *Experience with FEMA as first responder to disasters*
- *Go Team approach rapidly sets up program infrastructure*
- *Small business values with large-business infrastructure*
- *Award-winning company – Inc500/5000, Deloitte & Touche, SmartCEO, Gartner*

developing and executing specific housing, economic development and public infrastructure recovery programs from a variety of contractors with appropriate experience and proven performance. CVP has demonstrated extreme flexibility when called upon to perform a wide variety of tasks from providing oversight to other state contractors, to assisting in the improvement of processes and operations designed to expedite the delivery of aid to victims.

This breadth of experience will help ensure that the State of New Jersey is in compliance with the regulations set forth by the various agencies providing Hurricane Sandy relief. CVP has the experience to understand the subtleties and differences of each program and to tailor processes for each one, depending on the scope of responsibility outlined in the individual task orders.

For example, when working with the SBA, they provide a database of information that allows us to identify benefits already disbursed by the SBA, thereby fulfilling part of the Davis Bacon requirement to prevent duplication of benefits. This check helps identify any attempted fraud and also helps to ensure that the individual grant is compliant with Davis Bacon regulations.

**Key Success Factors.** Since the announcement of relief funds for the State of New Jersey, CVP has had discussions with representatives of the State of New Jersey to understand not only the facts of the situation but also those elements that will determine the success of their Hurricane Sandy disaster recovery program to the citizens of New Jersey, as well as to the State and Federal Government oversight agencies.

Based on our discussions with State of New Jersey staff, local officials and both HUD and FEMA, we understand that the following factors will drive success:

- **Deep Compliance Knowledge** – CDBG and FEMA programs require conformance with a wide variety of regulations from HUD, FEMA, SBA, and other agencies, and an understanding of how processes vary based on the focus of the recovery effort. The State of New Jersey will need a partner that can bring the specialized knowledge of and experience with CDBG process and regulations to this effort.
- **Integrity and Transparency** – The State of New Jersey must set a standard that is above reproach in the awarding, management, and reporting of all CDBG and FEMA funds with no impropriety or even the appearance of impropriety.
- **Speed of Relief** – Given the breadth of the damage and destruction, the State will benefit most from the rapid restoration and improvement of infrastructure and housing stock.

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### *A Culture of Results*

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*“Right after the hurricane (Katrina), we felt like we were drowning. Most of the consultants spent six months basically describing the water. Your team, on the other hand, dispenses with ceremony. They roll up their sleeves, say ‘We’re going to save this’ and then when it’s all done they show us how to swim.”*

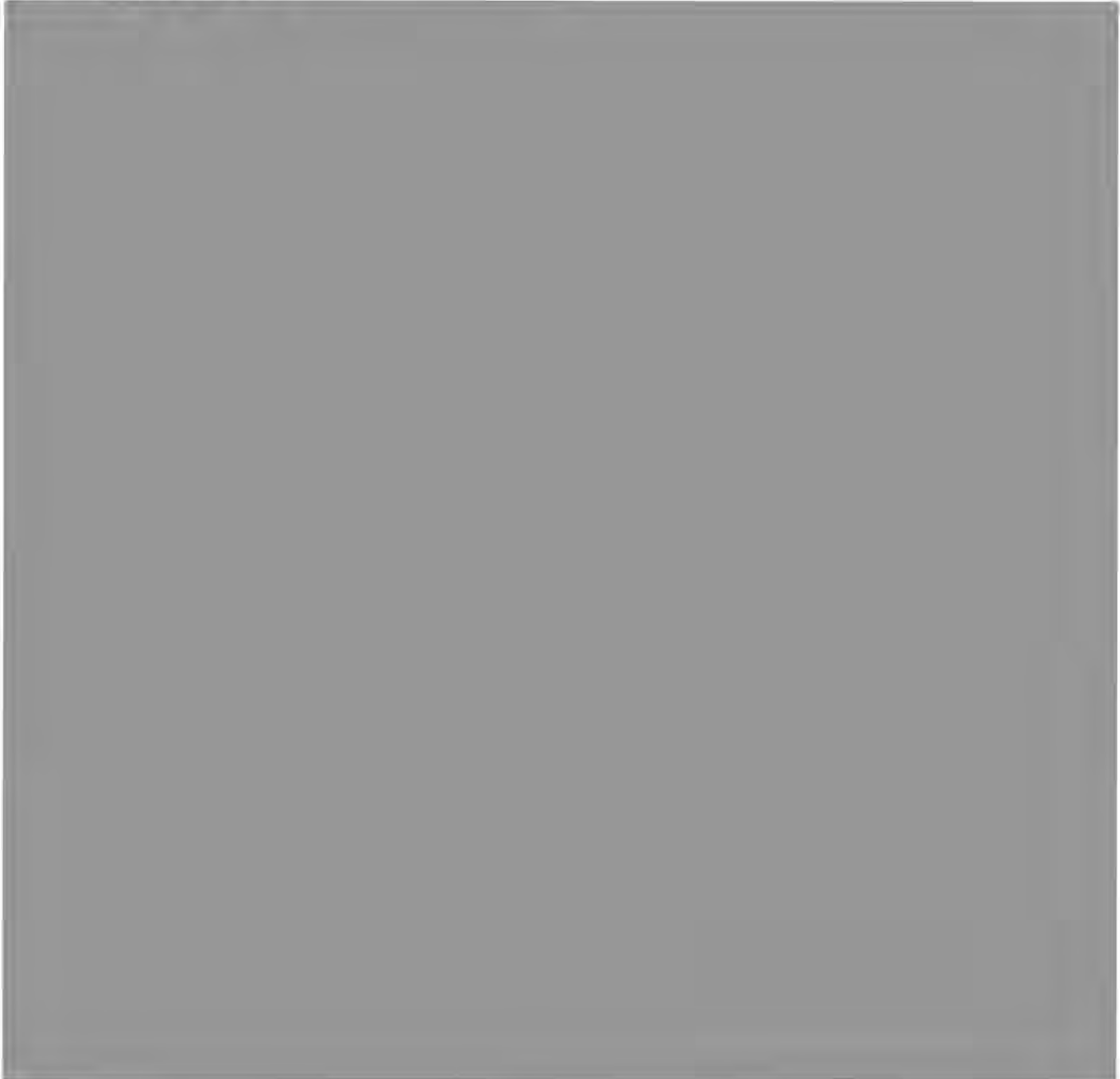
*– Policy Director, Governor’s Staff, State of Mississippi*

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- **Spirit of Partnership** – While having a turnkey solution will be critical to success, the right partner for the State of New Jersey will be one that communicates frequently and acts in concert with local partners as the program evolves. To ensure the success of the program, CVP is committed to partnering with small, local firms. By employing New Jersey businesses as partners, CVP and the overall effort will benefit from their local knowledge and relationships.

### **Summary of Approach**



## 6. RESUMES (RFQ 4.5)

Table 12 provides our proposed management and key personnel. We have also provided references from relevant contracts that they have worked for CVP. Resumes for key personnel follow the table.

*Table 12: Personnel Table with Relevant Contract References*

Name	Labor Category	Role	Reference Name/Address	Phone
	Partner/Principal	Executive Oversight		
	Program Manager / Subject Matter Expert	Contract Manager and Disaster Recovery and Grants Management Subject Matter Expert		
	Project Manager	Project Manager and Senior Grants Manager		
	Senior Consultant	Senior Grants Manager, FEMA		
	Senior Consultant	Senior Grants Manager, HUD		
	Consultant	Systems Development/DRGR		
	Consultant	Housing Program Specialist		

### **CHARLES SCHMIDT, PROGRAM MANAGER/SUBJECT MATTER EXPERT**

#### **Experience Summary**

Director of CVP's Emergency Preparedness and Recovery Division has more than 30 years of executive management experience in public and private sectors around the world. He has served as a CEO in three early-stage private companies and was a senior executive at a Fortune 1000 company, for 17 years. Additionally, he has more than 20 years of experience in fire and emergency medical services. He has served as a consultant and first responder during several large incidents in the U.S. and internationally, including Hurricane Katrina, the earthquake in Haiti, the earthquake/tsunami in Japan, and most recently, the Lower North Fork wildfire in Colorado. He is a Colorado-based former FEMA first responder and Fire Chief.



**Previous Similar Contract Experience**



**Education**

- BA in Business Administration, University of Northern Colorado
- MBA with an emphasis in International Management, University of Colorado
- Advanced Management College, Stanford University

**Professional Experience**

Dates	Firm	Roles
		Director, Emergency Planning, Response and Recovery Programs
		Vice President
		Vice President
		President/CEO
		President/CEO
		Corporate Vice President, General Manager
		Chief
		Affiliate Faculty Member

PROJECT MANAGER, PMP

**Experience Summary**

\_\_\_\_\_ a certified Project Management Professional (PMP), has over 16 years of operations planning, strategic communications and project management experience in emergency



management, homeland security, and information technology. Ms. Kennedy has a record of success for providing leadership, problem-solving, and creativity to the identification of solutions within the public sector. She is distinguished for delivering complex, multi-phase projects within budget, and developing a trusted advisor status through dynamic relationship management and partnering.

**Previous Similar Contract Experience**



**Education and Awards**

- BFA in Architectural Design, Virginia Commonwealth University
- Intro to CMMI Certification-SVC, Software Engineering Institute, Carnegie Mellon
- Awarded the National Governor’s Association Center for Best Practices for Individual Best Practices Award 3 years in a row in [REDACTED]

**Professional Experience**

Dates	Firm	Roles
[REDACTED]	[REDACTED]	Manager
[REDACTED]	[REDACTED]	Project/Program Manager
[REDACTED]	[REDACTED]	Communications Consultant
[REDACTED]	[REDACTED]	Consultant
[REDACTED]	[REDACTED]	IT Account Manager

**SENIOR CONSULTANT**

**Experience Summary**

█ has extensive experience in program management, performance planning and support, communications planning, leadership and development training, information management and relationship building. This knowledge has assisted her in successfully conducting and coordinating activities to identify potential problems, offer meaningful recommendations and develop processes and solutions for resolution of issues.

█ consistently provides a professional image, offering high caliber skills when planning, coordinating, facilitating and presenting and has built and maintained effective working relationships within several federal agencies.

**Previous Similar Contract Experience**



**Education**

- MBA (Leadership Development), Brenau University, Gainesville, GA
- BA (Communications), Mississippi State University, Starkville, MS
- AA, East MS Community College, Scooba, MS

### Professional Experience

Dates	Firm	Roles
[REDACTED]	[REDACTED]	Management Analyst, Department of State, Bureau of Diplomatic Security Service Center Manager, Mississippi Development Authority Applicant Services Specialist Congressional Liaison Area Assistant Supervisor Medicaid Specialist Assistant Manager Branch Manager

[REDACTED] **SENIOR CONSULTANT**

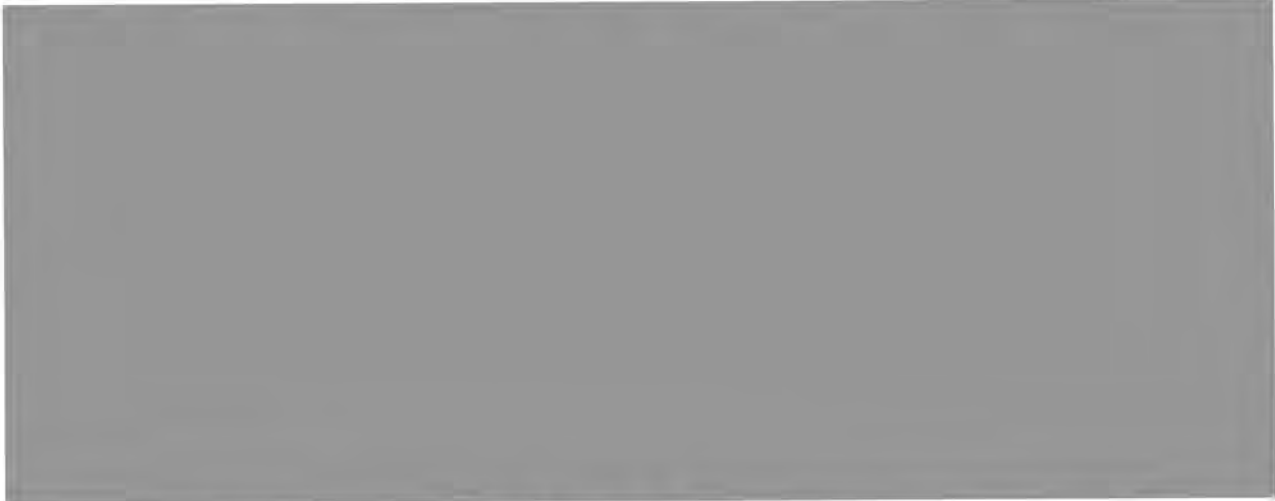
### Experience Summary

[REDACTED] manages projects for a range of clients, including a national health care organization, national health care provider, and a State-wide grant program, and her emphasis has been in the development of strategic marketing and communications plans, program analysis, and grant management, as well as in providing thought-leadership and serving as a trusted advisor to her clients.

Prior to joining CVP, [REDACTED] worked in the non-profit sector for more than 20 years in the areas of communications, public affairs, public program development, community outreach, strategic planning, non-profit management, and marketing, in the healthcare industry, as well as in public spaces, and cultural institutions.

### Previous Similar Contract Experience

[REDACTED]



### Education

- BA (Community Relations), *Summa cum Laude*, Lehman College, CUNY, NYC
- Council of State Community Development Agencies (COSDA): **Community Development Block Grant (CDBG) Boot Camp**

### Professional Experience

Dates	Firm	Roles
[REDACTED]	[REDACTED]	Deputy Project Manager, State of Tennessee Economic and Community Development CDBG Program Senior Vice President Programs and Outreach Community Affairs and Special Projects Manager Community Relations Coordinator Assistant Coordinator, Public Relations and Marketing Assistant Editor, Garden Magazine

[REDACTED] **CONSULTANT**

### Experience Summary

[REDACTED] has served as a subject matter expert and case manager for various CDBG Disaster Recovery Projects since 2009 including Hurricanes Katrina (MS), Rita (TX), and Ike (IL). [REDACTED] was a licensed insurance agent and insurance underwriter, and was the Office Manager for a Law Office and Title Company.

### Previous Similar Contract Experience





**Education**

- AA, Westminster College, Tehuacana, TX

**Professional Experience**

Dates	Firm	Roles
[Redacted]	[Redacted]	Senior Associate
		Grant Manager
		Team Lead
		Contract Title Consultant
		Team Lead
		Contract employee for Disaster Recovery Project
		Office Manager
		Title Abstractor
		Administrative Assistant
		Life and Disability underwriter
Pension Administration		
Administrative Assistant for Financial Planning Division/Sales Agent		
Office Manager, Insurance Agent		

**CONSULTANT**

**Experience Summary**

has more than 12 years experience providing technical and analytical support services to state government, healthcare, and consulting organizations. He has successfully implemented solutions to increase productivity, improve performance, and initiate audit controls resulting in time and cost savings and confidence in reporting. His focus is on client satisfaction and producing timely and quality deliverables.

**Previous Similar Contract Experience**



**Education**

- BS, Architectural Engineering Technology, University of Southern Mississippi
- Project Management Breakthrough, Priority Management

**Professional Experience**

Dates	Firm	Roles
		Manager – Systems Manager Senior Associate - Developer/Analyst Developer/Analyst Business Analyst II; Senior Help Desk Analyst Computer Technician



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INTEGRITY MONITORING/ANTI-FRAUD SERVICES FOR  
DISASTER RECOVERY ASSISTANCE (HURRICANE SANDY)**

**RFQ768892S**

**COST PROPOSAL**

**SUBMITTED BY:**

**SUBMITTED TO:**

***Customer Value Partners***

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Fairfax, VA 22030

Phone: (703) 345-9100

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*Program and Process Management Auditing,  
Financial Auditing and Grant Management, and  
Integrity Monitoring/Anti-Fraud Services for  
Disaster Recovery Assistance (Hurricane Sandy)  
RFQ768892S*

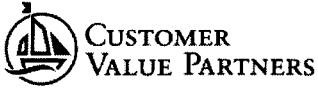


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## 1. INTRODUCTION

Customer Value Partners (CVP) is pleased to submit our Cost Proposal in response to the State of New Jersey Request for Quotation (RFQ) for Program and Process Management, Financial Auditing and Grant Management, and Integrity Monitoring/Anti-Fraud Services for Disaster Recovery Assistance related to Hurricane Sandy. Our cost proposal is for all three pools specified in the RFQ.

CVP is a General Services Administration (GSA) Mission Oriented Business Integrated Services (MOBIS) – Schedule 874 contract holder. Our cost proposal is consistent with the terms and conditions of our MOBIS contract.

Table 1 provides CVP corporate information as well as information about our MOBIS contract.

*Table 1: CVP Corporate Information*

<b>Name and Address</b>	Customer Value Partners, Inc. 3701 Pender Drive, Suite 200 Fairfax, VA 22030
<b>Point of Contact</b>	Charles Schmidt Phone: 303-883-7361 Fax: [REDACTED] <a href="mailto:cschmidt@cvpcorp.com">cschmidt@cvpcorp.com</a>
<b>DUNS Number</b>	11-304-5715
<b>CAGE Code</b>	3EU68
<b>MOBIS Schedule Number</b>	GS-10F-0317R
<b>MOBIS Term</b>	May 10, 2005 through May 09, 2015 (eligible for renewal)

Our rates reflect our current MOBIS rates. These rates will remain in effect for the entire term of the contract. We will consider offering the State of New Jersey discounts off of our published rates on a Task Order basis.

Table 2 provides a mapping of CVP’s MOBIS Labor Categories to the Staff Classifications specified in the Request for Quotation (RFQ).

*Table 2: Mapping of MOBIS Labor Categories to RFQ Staff Classifications*

<b>RFQ Staff Classification</b>	<b>CVP MOBIS Labor Category</b>
Partner/Principal/Director	Senior Executive
Program Manager	Senior Program Manager
Project Manager	Project Manager
Subject Matter Expert	Senior Functional Subject Matter Expert
Supervisory/Senior	Senior Process Consultant



*Program and Process Management Auditing,  
Financial Auditing and Grant Management, and  
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**RFQ768892S**



<b>RFQ Staff Classification</b>	<b>CVP MOBIS Labor Category</b>
Consultant	Senior Associate
Associate/Staff	Associate
Administrative Support Staff	Program Support Associate



*Program and Process Management Auditing,  
Financial Auditing and Grant Management, and  
Integrity Monitoring/Anti-Fraud Services for  
Disaster Recovery Assistance (Hurricane Sandy)  
RFQ768892S*



**2. COST SCHEDULE**

The following tables provide CVP's rates for each pool for the base years of the contract.

**Bidder's Name:** Customer Value Partners, Inc.

*Table 3: Pool 1: Program and Process Management Auditing*

Line #	Staff Classifications	Year 1 Hourly Rate	Year 2 Hourly Rate	Year 3 Hourly Rate
1.	Partner/Principal/Director	\$ 244.08	\$ 244.08	\$ 244.08
2.	Program Manager	\$ 213.75	\$ 213.75	\$ 213.75
3.	Project Manager	\$ 143.58	\$ 143.58	\$ 143.58
4.	Subject Matter Expert	\$ 213.75	\$ 213.75	\$ 213.75
5.	Supervisory/Senior Consultant	\$ 172.29	\$ 172.29	\$ 172.29
6.	Consultant	\$ 129.22	\$ 129.22	\$ 129.22
7.	Associate/Staff	\$ 90.93	\$ 90.93	\$ 90.93
8.	Administrative Support Staff	\$ 42.75	\$ 42.75	\$ 42.75

**Bidder's Name:** Customer Value Partners, Inc.

*Table 4: Pool 2: Financial Auditing and Grant Management*

Line #	Staff Classifications	Year 1 Hourly Rate	Year 2 Hourly Rate	Year 3 Hourly Rate
9.	Partner/Principal/Director	\$ 244.08	\$ 244.08	\$ 244.08
10.	Program Manager	\$ 213.75	\$ 213.75	\$ 213.75
11.	Project Manager	\$ 143.58	\$ 143.58	\$ 143.58
12.	Subject Matter Expert	\$ 213.75	\$ 213.75	\$ 213.75
13.	Supervisory/Senior Consultant	\$ 172.29	\$ 172.29	\$ 172.29
14.	Consultant	\$ 129.22	\$ 129.22	\$ 129.22
15.	Associate/Staff	\$ 90.93	\$ 90.93	\$ 90.93
16.	Administrative Support Staff	\$ 42.75	\$ 42.75	\$ 42.75



**Program and Process Management Auditing,  
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**Bidder's Name:** Customer Value Partners, Inc.

*Table 5: Pool 3: Integrity Monitoring/Anti-Fraud*

Line #	Staff Classifications	Year 1 Hourly Rate	Year 2 Hourly Rate	Year 3 Hourly Rate
17.	Partner/Principal/Director	\$ 244.08	\$ 244.08	\$ 244.08
18.	Program Manager	\$ 213.75	\$ 213.75	\$ 213.75
19.	Project Manager	\$ 143.58	\$ 143.58	\$ 143.58
20.	Subject Matter Expert	\$ 213.75	\$ 213.75	\$ 213.75
21.	Supervisory/Senior Consultant	\$ 172.29	\$ 172.29	\$ 172.29
22.	Consultant	\$ 129.22	\$ 129.22	\$ 129.22
23.	Associate/Staff	\$ 90.93	\$ 90.93	\$ 90.93
24.	Administrative Support Staff	\$ 42.75	\$ 42.75	\$ 42.75