



Proposal for Strategic Management Consulting Services: Solicitation Number 44-22

Region 14 Education Service Center and
National Cooperative Purchasing Alliance

November 17, 2022

Alyssa G. Martin, CPA | National Strategy Leader

M. Todd Hoffman | Partner, Government Consulting Services

Weaver and Tidwell, L.L.P. | 2300 N. Field Street, Suite 1000 | Dallas, TX 75201



November 17, 2022

Region 14 Education Service Center
4300 S. Treadaway | Abilene, TX 79605

RE: Proposal for Strategic Management Consulting Services: Solicitation Number 44-22

Weaver provides exceptional service to government agencies, especially those in education. Today, the stakes for serving our communities have never been higher: critical infrastructure, the environment, economic development, sustainability, long-term capital planning and disaster recovery programs all require close planning and execution, due to the level of scrutiny each will engender.

Government agencies, colleges, universities and school districts have a once-in-a-generation opportunity to make a lasting difference. Major investments offer the potential to transform society through innovative programs and processes that will have meaningful impact on our lives.

In these high-visibility environments, executing large-scale change requires a fresh approach and effective ways to address risk, solve problems and report results. Citizens need more communication, transparency and accountability. They want to know how, when and where their tax dollars are being put to work. Effective management and efficient systems win the day, but they aren't always easy.

Weaver can help.

Weaver brings a team with the skills and experience to help clients address critical challenges. With 70+ years of experience in government and education, our clients know they can count on us to provide strategic management consulting services that help you and your stakeholders design and execute transformative solutions.



VALUE THROUGH INSIGHT. The real value of these services come from professionals with the insight and experience to put information in a meaningful context clients can use. We will work to ensure our recommendations are relevant, realistic, and scalable to suit each participating entity's needs as circumstances change over time, **supportive of each client's overall mission.**



A BIG PICTURE PERSPECTIVE. Projects like these aren't singular events. The greatest impact results from building on work that's already been performed. We continuously enhance our understanding of each client's organization, culture, challenges and opportunities **so we can provide efficient, impactful services that deliver meaningful value over time.**



COLLABORATIVE, CONSULTATIVE APPROACH. We work closely with our clients to navigate internal complexities to confirm focused, customized services. Along the way, we'll communicate regularly to facilitate and support the implementation of any recommendations and educate internal resources, giving them the **tools they need to support process and cultural changes over the long term.**

School districts, universities and public agencies of all sizes rely on Weaver to help them with their strategic management consulting priorities, as well as managing risk, meeting their biggest challenges and achieving success. Weaver serves more than 50 school districts and Education Service Centers across the U.S., including [REDACTED], [REDACTED], and many others.



Our Understanding of the Scope

Region 14 Education Service Center (Region 14 ESC), teaming with the National Cooperative Purchasing Alliance (NCPA) on behalf of 42 school districts in 13 counties across rural West Texas and across all NCPA-participant agencies, is seeking to establish a broad-reaching master services agreement (MSA) for strategic management consulting services. The preferred MSA will span beyond the service area of Region 14 ESC, including in its scope all education, not-for-profit, governmental, health care and other public agencies across the United States, its territories, and Canada.

Specifically, Region 14 ESC and NCPA seek to secure a practical, reliable, sustainable and valuable MSA for as-needed management consulting services that span the gamut of your most pressing needs at a national scale. From ensuring the physical and digital safety of citizens, to shoring up operational and back-office functions, to readying students and workforces for the future, and everything in between — you want to do your part to ensure healthy, sustainable communities.

In the proposal that follows, Weaver presents the resources and methodology to Region 14 ESC and NCPA with our best solutions to support your broad transformation initiative. We are ready whenever you need us, at competitive fees to help you reach and exceed your far-reaching goals. We intend to respond to the following 12 categories:



About Our Team

Texas-founded and now with national presence, Weaver is a Top 35 certified public accounting/advisory firm. We are excited to make our best-practice project management, operational, technology and analytic capabilities available to public agencies throughout NCPA's service area.

The Weaver team brings leading practices in transformation to the public sector: Weaver's professionals assist state, local and municipal governments, K-12 and higher education institutions, and not-for profit organizations in designing and executing transformational change and modernization practices in areas ranging from grants management to IT, cybersecurity, human resources, business process improvement, change management, governance and more.

From capital projects and economic development initiatives to disaster recovery readiness and ESG goals, our professionals also assist our government clients in managing the myriad of tasks for multiple grants with innovative technology tools through planning, funding, execution, and reporting for large-scale, complex programs so they can make the best use of an unprecedented opportunity to invest in the future.

We've also partnered with select firms to offer Region 14 ESC and all organizations party to NCPA comprehensive insights into how to improve overall organizational effectiveness, measurements, and resilience. These firms include:

INTEGERHEALTH

IntegerHealth is a health care analytics company that quantifies health care outcomes — in a way no one else does. IntegerHealth merges cost and quality into a single dollars and cents value on each outcome, generating actionable analytics that drive down health care costs while improving the quality of care for health plans, wellness programs and workers' compensation.



FORESITE GROUP

Foresite Group provides comprehensive consulting and design services for buildings, landscapes, traffic and technology engineering. They serve government, education and private clients from 16 U.S. locations.



THE GOODMAN CORPORATION

The Goodman Corporation (TGC) is a certified Small Business Enterprise. TGC's multi-faceted team is a one-stop shop for all things transportation-related — from administrative, to financial, to maintenance and Key Performance Indicators (KPIs).



ALVAREZ & MARSAL

Alvarez & Marsal (A&M) is a management consulting firm focused on performance improvement, turnaround management and crisis management for government entities and private sector clients.



Results
„MassIngenuity“

MASS INGENUITY

Mass Ingenuity is a full-service, high-touch organization development and enterprise performance management firm that has successfully integrated “people, process and technology” for numerous government agencies. Mass Ingenuity’s core purpose is to enable every domain, department and division of an organization to reach its full potential through innovative enterprise performance management consulting.

We Want to Work with You

Working as one Weaver team, we have demonstrated ability and commitment to help solve seemingly intractable, intricate organizational issues. **No matter your needs, we have you covered.**

Thank you for the opportunity to submit our on-point qualifications and experience. Should you have any questions regarding our proposal or any other matter, please don’t hesitate to contact either of us at any time.

Sincerely,

A handwritten signature in black ink, appearing to read "Alyssa G. Martin".

Alyssa G. Martin, CPA
National Strategy Leader

A handwritten signature in black ink, appearing to read "M. Todd Hoffman".

M. Todd Hoffman
Partner, Government Consulting



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The information contained herein is provided only for the use of the intended recipient for the intended purpose, includes confidential and trade secrets information, and may be protected from disclosure by law or privilege. Unless otherwise noted, information is provided as of November 17, 2022, and is subject to subsequent revision based on changes of circumstances. Distribution is prohibited.

Sections Exempt From Disclosure



Substantiation of Exceptions

This proposal includes specific client and cost information that should not be released except within Region 14 ESC and NCPA. This information, if released to a competitor, could unfairly reveal Weaver's plans and strategies for business development by identifying the types of customers targeted and solicited by Weaver. This information is proprietary business development information that Weaver (the Company) has taken significant steps to protect.

Customer List

Notably, while some courts have held that a customer list is not a trade secret, the determinative factor in those decisions was a finding that the information in question was readily ascertainable from other sources. See Open Records Decision No. 552 (1990); see also Allan J. Richardson & Assoc., Inc. v. Andrews, 718 S.W.2d 833 (Tex. App.--Houston [14th Dist.] 1986, no writ); Research Equip. Co. v. Galloway, 485 S.W.2d 953 (Tex. Civ. App.--Waco 1972, no writ). Weaver's customer list is not readily available from any alternative source; therefore, the above-referenced case law is not applicable.

Financial Data and Proprietary Pricing Structure

Weaver also believes that its financial data (such as financial statements) and pricing structure constitute a trade secret that should be excepted from disclosure. Admittedly, the total bid amount is not a trade secret, but the documents requested incorporate much more than just the total bid amount. The pricing structure identifies Weaver's proprietary process for calculating the bid, including any possible discounting strategies that Weaver has decided to incorporate as part of its ongoing competitive efforts in the accounting, auditing and financial services market.

These pricing methods are confidential information that Weaver does not publicly disclose. Additionally, our financial information is considered confidential business information. As we are a privately held firm, we do not disclose anything other than total revenue numbers, except under extraordinary circumstances. The details of how we manage our business should be considered confidential.

Pricing information is highly valuable and has been developed at great expense, over time, by Weaver's technical and marketing experts. Weaver segregates its pricing structure by engagement team and to supervisory personnel only. This allows for the philosophy used to price engagements for a particular service to remain confidential. Additionally, strategy as to how resources are deployed is displayed by the pricing structure. The value for each team member that is included in the cost proposal detail is a point of engagement differentiation.

Allowing competitors to have access to Weaver's pricing information will necessarily give those competitors unfair advantages in the next proposal submitted by other companies. The competitor will already know how Weaver will price a project, and the competitor can therefore underbid the Weaver proposals using Weaver's inside proprietary information.

Additionally, Texas Government Code Section 552.110(c) protects "[c]ommercial or financial information for which it is demonstrated based on specific factual evidence that disclosure would cause substantial competitive harm to the person from whom the information was obtained[.]"



This exception to disclosure requires a specific factual or evidentiary showing, not conclusory or generalized allegations, that substantial competitive injury would likely result from release of the information at issue. See Open Records Decision No. 661 (1999) (for information to be withheld under commercial or financial information prong of § 552.110, business must show by specific factual evidence that substantial competitive injury would result from release of particular information at issue).

With regard to pricing, we recognize that the Attorney General has previously stated that his “office considers the prices charged in government contract awards to be a matter of strong public interest.” See Open Records Decision No. 514 (1988) (public has interest in knowing prices charged by government contractors). Weaver does not assert that the total contract amount of the winning bidder should be excepted from disclosure; however, the documents requested provide much more information than just the total amount of public funds that would be paid under a contract with this Company. Rather, the pricing documents incorporate proprietary pricing strategies and business decisions that would allow a competitor to avoid spending the resources expended by Weaver to develop its pricing structure and to gain a competitive advantage over Weaver.

Page	Section	Reason for Exception
Tab 4 – Vendor Profile		
p. 29	Representative Government/Government-Funded Clients	Customer List
p. 30	Representative Current Not-for-Profit Engagements	Customer List
p. 34	Todd Hoffman Bio - Representative Client Experience	Customer List
p. 32	Alyssa Martin Bio - Representative Client Experience	Customer List
p. 35	John Wauson Bio - Representative Client Experience	Customer List
p. 36	Brandon Tanous Bio - Representative Client Experience	Customer List
p. 38	Adam Jones Bio - Representative Client Experience	Customer List
p. 40	Dan Graves Bio - Representative Client Experience	Customer List
p. 42	Morgan Page Bio - Representative Client Experience	Customer List
p. 44	Annual Sales – Revenue Numbers (FY20, FY21 & FY22)	Financial Data
Tab 5 – Products and Services		
p. 59	Our Experience in Action: Sample Projects	Customer List
p. 60	TAKING A NEW APPROACH: CITY OF HOUSTON – Project Description	Customer List
p. 60	PRACTICAL STEPS FOR REAL RESULTS: TYLER JUNIOR COLLEGE – Project Description	Customer List
p. 61	ACTIONABLE INSIGHTS: LOWER COLORADO RIVER AUTHORITY – Project Description	Customer List
1. Achieving a Better State of Health		
p. 70	Weaver Lead – John Wauson, Representative Clients	Customer List
p. 70 - 72	Our Experience – All Client Project Descriptions	Customer List
p. 72	Our Team – Anna Stevens, Representative Clients	Customer List
p. 73	Our Team – Yoram Kappel, Representative Clients	Customer List
2. Modernizing Public Safety		
p. 78	Weaver Lead – Todd Hoffman, Representative Clients	Customer List
p. 79 - 81	Our Experience – All Client Project Descriptions	Customer List

Page	Section	Reason for Exception
p. 82 - 83	Our Team – Aaron Howard, Representative Clients Our Team – Jim Clark, Representative Clients Our Team – Paul Aljets, Representative Clients	Customer List
3. Building Infrastructure for the 21st Century		
p. 93	Weaver Lead – Brandon Tanous, Representative Clients	Customer List
p. 93 - 98	Our Experience – All Client Project Descriptions	Customer List
p. 99- 100	Our Team – Alyssa Martin, Representative Clients Our Team – Todd Hoffman, Representative Clients Our Team – Adam Jones, Representative Clients Our Team – Michael Karnes, Representative Clients Our Team – David Butler, Representative Clients	Customer List
5. Educating Citizens for the Future		
p. 110	Weaver Lead – Adam Jones, Representative Clients	Customer List
p. 111- 114	Our Experience – All Client Project Descriptions	Customer List
p. 114 - 118	Our Team – Brandon Tanous, Representative Clients Our Team – Dan Graves, Representative Clients Our Team – Alyssa Martin, Representative Clients Our Team – Sara Dempsey, Representative Clients Our Team – Jennifer Ripka, Representative Clients Our Team – Bruce Mills, Representative Clients	Customer List
8. Building Resilience and Crisis Response		
p. 124 - 125	Weaver Lead – Brandon Tanous, Representative Clients Weaver Lead – Alyssa Martin, Representative Clients	Customer List
p. 125 - 128	Our Experience – All Client Project Descriptions	Customer List
p. 128 – 129	Our Team – Adam Jones, Representative Clients Our Team – Dan Graves, Representative Clients Our Team – Todd Hoffman, Representative Clients Our Team – Bruce Mills, Representative Clients	Customer List
9. Transforming Back-Office Functions		
p. 134	Weaver Lead – Alyssa Martin, Representative Clients	Customer List
p. 135 - 141	Our Experience – All Client Project Descriptions	Customer List
p. 141 - 144	Our Team – Todd Hoffman, Representative Clients Our Team – Brandon Tanous, Representative Clients Our Team – Dan Graves, Representative Clients Our Team – Reema Parappilly, Representative Clients Our Team – Aaron Howard, Representative Clients Our Team – Jim Clark, Representative Clients Our Team – Paul Aljets, Representative Clients	Customer List
10. Driving Operational Transformations		
p. 151	Weaver Lead – Brandon Tanous, Representative Clients	Customer List
p. 152-156	Our Experience – All Client Project Descriptions	Customer List

Page	Section	Reason for Exception
p. 157- 159	Our Team – Adam Jones, Representative Clients Our Team – Alyssa Martin, Representative Clients Our Team – Holly Hart, Representative Clients Our Team – Aaron Howard, Representative Clients Our Team – Jim Clark, Representative Clients Our Team – Paul Aljets, Representative Clients	Customer List
11. Creating a Better Citizen Experience, Including Digitization		
p. 166	Weaver Lead – Todd Hoffman, Representative Clients	Customer List
p. 167 - 170	Our Experience – All Client Project Descriptions	Customer List
p. 171 - 171	Our Team – Morgan Page, Representative Clients Our Team – Alyssa Martin, Representative Clients	Customer List
12. Addressing Capital Productivity and Capital Management		
p. 179	Weaver Lead – Dan Graves, Representative Clients	Customer List
p. 179 - 181	Our Experience – All Client Project Descriptions	Customer List
p. 182- 183	Our Team – Alyssa Martin, Representative Clients Our Team – Jason Berkenpas, Representative Clients Our Team – David Butler, Representative Clients Our Team – Destiny Jasso, Representative Clients	Customer List
13. Delivering Effective Strategies and Plans		
p. 187	Weaver Lead – Todd Hoffman, Representative Clients	Customer List
p. 188 - 192	Our Experience – All Client Project Descriptions	Customer List
p. 193	Our Team – Alyssa Martin, Representative Clients	Customer List
14. Applying Advanced Analytics		
p. 200	Weaver Lead – Morgan Page, Representative Clients	Customer List
p. 201 - 205	Our Experience – All Client Project Descriptions	Customer List
p. 206	Our Team – Alyssa Martin, Representative Clients	Customer List
15. Transforming Organizations, Workforce, and Culture		
p. 214	Weaver Lead – Adam Jones, Representative Clients	Customer List
p. 215 - 216	Our Experience – All Client Project Descriptions	Customer List
p. 217 - 218	Our Team – Alyssa Martin, Representative Clients Our Team – Todd Hoffman, Representative Clients Our Team – Marci Sundbeck, Representative Clients	Customer List
16. Managing Risk		
p. 227	Weaver Lead – Alyssa Martin, Representative Clients	Customer List
p. 227 - 230	Our Experience – All Client Project Descriptions	Customer List

Page	Section	Reason for Exception
p. 231 - 234	Our Team – John Wauson, Representative Clients Our Team – Dan Graves, Representative Clients Our Team – Brandon Tanous, Representative Clients Our Team – Morgan Page, Representative Clients Our Team – Adam Jones, Representative Clients Our Team – Marci Sundbeck, Representative Clients Our Team – Holly Hart, Representative Clients	Customer List
Tab 6 – References		
p. 241 - 247	References - All	Customer List
Tab 8 – Value Added Products and Services		
p. 255	Relevant Grant-Related Project Experience	Customer List
Pricing Excel (Separate File)		
All Tabs and All Lines		Proprietary Pricing Structure

Tab 1 – Master Agreement/Signature Form



SIGNATURE FORM

The undersigned hereby proposes and agrees to furnish goods and/or services in strict compliance with the terms, specifications and conditions at the prices proposed within response unless noted in writing. The undersigned further certifies that he/she is an officer of the company and has authority to negotiate and bind the company named below and has not prepared this bid in collusion with any other Respondent and that the contents of this proposal as to prices, terms or conditions of said bid have not been communicated by the undersigned nor by any employee or agent to any person engaged in this type of business prior to the official opening of this proposal.

Prices are guaranteed: **120 days**

Weaver and Tidwell, L.L.P.
Company Name

2300 North Field Street, Suite 1000
Address

Dallas	TX	75201
City	State	Zip

[Redacted]

Telephone Number Fax Number

[Redacted]

Email Address

Alyssa Martin, CPA

Partner | National Strategy Leader,
Large Market & Public Entities

Printed Name

Position


Authorized Signature

Tab 2 – NCPA Administration Agreement



TAB 2

NCPA ADMINISTRATION AGREEMENT

This Administration Agreement is made as of November 17, 2022, by and between National Cooperative Purchasing Alliance (“NCPA”) and Weaver and Tidwell, L.L.P. (“Vendor”).

Recitals

WHEREAS, Region 14 ESC has entered into a certain Master Agreement dated November 17, 2022, referenced as Contract Number Solicitation Number 44-22, by and between Region 14 ESC and Vendor, as may be amended from time to time in accordance with the terms thereof (the “Master Agreement”), for the purchase of Strategic Management Consulting Services;

WHEREAS, said Master Agreement provides that any state, city, special district, local government, school district, private K-12 school, technical or vocational school, higher education institution, other government agency or nonprofit organization (hereinafter referred to as “public agency” or collectively, “public agencies”) may purchase products and services at the prices indicated in the Master Agreement;

WHEREAS, NCPA has the administrative and legal capacity to administer purchases under the Master Agreement to public agencies;

WHEREAS, NCPA serves as the administrative agent for Region 14 ESC in connection with other master agreements offered by NCPA

WHEREAS, Region 14 ESC desires NCPA to proceed with administration of the Master Agreement;

WHEREAS, NCPA and Vendor desire to enter into this Agreement to make available the Master Agreement to public agencies on a national basis;

NOW, THEREFORE, in consideration of the payments to be made hereunder and the mutual covenants contained in this Agreement, NCPA and Vendor hereby agree as follows:

General Terms and Conditions

- The Master Agreement, attached hereto as Exhibit 1 and incorporated herein by reference as though fully set forth herein, and the terms and conditions contained therein shall apply to this Administration Agreement except as expressly changed or modified by this Administration Agreement.
- NCPA shall be afforded all of the rights, privileges and indemnifications afforded to Region 14 ESC under the Master Agreement, and such rights, privileges and indemnifications shall accrue and apply with equal effect to NCPA under this Administration Agreement including, but not limited to, Contractor’s obligation to provide appropriate insurance and certain indemnifications to Region 14 ESC.

- Contractor shall perform all duties, responsibilities and obligations required under the Master Agreement in the time and manner specified by the Master Agreement.
- NCPA shall perform all of its duties, responsibilities, and obligations as administrator of purchases under the Master Agreement as set forth herein, and Contractor acknowledges that NCPA shall act in the capacity of administrator of purchases under the Master Agreement.
- With respect to any purchases made by Region 14 ESC or any Participating Agency pursuant to the Master Agreement, NCPA (a) shall not be construed as a dealer, re-marketer, representative, partner, or agent of any type of Contractor, Region 14 ESC, or such Participating Agency, (b) shall not be obligated, liable or responsible (i) for any orders made by Region 14 ESC, any Participating Agency or any employee of Region 14 ESC or Participating Agency under the Master Agreement, or (ii) for any payments required to be made with respect to such order, and (c) shall not be obligated, liable or responsible for any failure by the Participating Agency to (i) comply with procedures or requirements of applicable law, or (ii) obtain the due authorization and approval necessary to purchase under the Master Agreement. NCPA makes no representations or guaranties with respect to any minimum purchases required to be made by Region 14 ESC, any Participating Agency, or any employee of Region 14 ESC or Participating Agency under this Administration Agreement or the Master Agreement.
- With respect to any supplemental agreement entered into between a Participating Agency and Contractor pursuant to the Master Agreement, NCPA, its agents, members and employees shall not be made party to any claim for breach of such agreement.
- This Administration Agreement supersedes any and all other agreements, either oral or in writing, between the parties hereto with respect to the subject matter hereof, and no other agreement, statement, or promise relating to the subject matter of this Administrative Agreement which is not contained herein shall be valid or binding.
- Contractor agrees to allow NCPA to use their name and logo within website, marketing materials and advertisement. Any use of NCPA name and logo or any form of publicity regarding this Administration Agreement or the Master Agreement by Contractor must have prior approval from NCPA.
- If any action at law or in equity is brought to enforce or interpret the provisions of this Administration Agreement or to recover any administrative fee and accrued interest, the prevailing party shall be entitled to reasonable attorney's fees and costs in addition to any other relief to which such party may be entitled.
- Neither this Administration Agreement nor any rights or obligations hereunder shall be assignable by Contractor without prior written consent of NCPA, provided, however, that the Contractor may, without such written consent, assign this Administration Agreement and its rights and delegate its obligations hereunder in connection with the transfer or sale of all or substantially all of its assets or business related to this Administration Agreement, or in the event of its merger, consolidation, change in control or similar transaction. Any permitted assignee shall assume all assigned obligations of its assignor under this Administration Agreement.
- This Administration Agreement and NCPA's rights and obligations hereunder may be assigned at NCPA's sole discretion, to an existing or newly established legal entity that has the authority and capacity to perform NCPA's obligations hereunder.

Term of Agreement

This Agreement shall be in effect so long as the Master Agreement remains in effect, provided, however, that the obligation to pay all amounts owed by Vendor to NCPA through the

termination of this Agreement and all indemnifications afforded by Vendor to NCPA shall survive the term of this Agreement.

Fees and Reporting

The awarded vendor shall electronically provide NCPA with a detailed quarterly report showing the dollar volume of all sales under the contract for the previous quarter. Reports are due on the fifteenth (15th) day after the close of the previous quarter. It is the responsibility of the awarded vendor to collect and compile all sales under the contract from participating members and submit one (1) report. The report shall include at least the following information as listed in the example below:

Entity Name	Zip Code	State	PO or Job #	Sale Amount

Total _____

Each quarter NCPA will invoice the vendor based on the total of sale amount(s) reported. From the invoice the vendor shall pay to NCPA an administrative fee based upon the tiered fee schedule below. Vendor’s annual sales shall be measured on a calendar year basis. Deadline for term of payment will be included in the invoice NCPA provides.

Annual Sales Through Contract	Administrative Fee
0 - \$30,000,000	2%
\$30,000,001 - \$50,000,000	1.5%
\$50,000,001+	1%

Supplier shall maintain an accounting of all purchases made by Public Agencies under the Master Agreement. NCPA and Region 14 ESC reserve the right to audit the accounting for a period of four (4) years from the date NCPA receives the accounting. In the event of such an audit, the requested materials shall be provided at the location designated by Region 14 ESC or NCPA. In the event such audit reveals an under reporting of Contract Sales and a resulting underpayment of administrative fees, Vendor shall promptly pay NCPA the amount of such underpayment, together with interest on such amount and shall be obligated to reimburse NCPA’s costs and expenses for such audit.

ACKNOWLEDGMENT OF CONTRACTOR REQUIREMENTS

National Cooperative Purchasing Alliance
Organization

Name

Title

Address

Address

Signature

Date

Weaver and Tidwell, L.L.P.
Vendor Name

Alyssa Martin, CPA
Name

Partner | National Strategy Leader, Large Market
& Public Entities
Title

2300 North Field Street, Suite 100
Address

Dallas, TX 75201
Address


Signature

November 17, 2022
Date

Tab 3 – Vendor Questionnaire



TAB 3
VENDOR QUESTIONNAIRE

Please provide responses to the following questions that address your company's operations, organization, structure, and processes for providing products and services.

Locations Covered

- Bidder must indicate any and all locations where products and services can be offered.
- Please indicate the price co-efficient for each location if it varies.

<input checked="" type="checkbox"/> All 50 States & District of Columbia (Selecting this box is equal to checking all boxes below)			
<input type="checkbox"/> Alabama	<input type="checkbox"/> Illinois	<input type="checkbox"/> Montana	<input type="checkbox"/> Rhode Island
<input type="checkbox"/> Alaska	<input type="checkbox"/> Indiana	<input type="checkbox"/> Nebraska	<input type="checkbox"/> South Carolina
<input type="checkbox"/> Arizona	<input type="checkbox"/> Iowa	<input type="checkbox"/> Nevada	<input type="checkbox"/> South Dakota
<input type="checkbox"/> Arkansas	<input type="checkbox"/> Kansas	<input type="checkbox"/> New Hampshire	<input type="checkbox"/> Tennessee
<input type="checkbox"/> California	<input type="checkbox"/> Massachusetts	<input type="checkbox"/> New Jersey	<input type="checkbox"/> Texas
<input type="checkbox"/> Colorado	<input type="checkbox"/> Michigan	<input type="checkbox"/> New Mexico	<input type="checkbox"/> Utah
<input type="checkbox"/> Connecticut	<input type="checkbox"/> Minnesota	<input type="checkbox"/> New York	<input type="checkbox"/> Vermont
<input type="checkbox"/> Delaware	<input type="checkbox"/> Mississippi	<input type="checkbox"/> North Carolina	<input type="checkbox"/> Virginia
<input type="checkbox"/> D.C.	<input type="checkbox"/> Missouri	<input type="checkbox"/> North Dakota	<input type="checkbox"/> Washington
<input type="checkbox"/> Florida	<input type="checkbox"/> Kentucky	<input type="checkbox"/> Ohio	<input type="checkbox"/> West Virginia
<input type="checkbox"/> Georgia	<input type="checkbox"/> Louisiana	<input type="checkbox"/> Oklahoma	<input type="checkbox"/> Wisconsin
<input type="checkbox"/> Hawaii	<input type="checkbox"/> Maine	<input type="checkbox"/> Oregon	<input type="checkbox"/> Wyoming
<input type="checkbox"/> Idaho	<input type="checkbox"/> Maryland	<input type="checkbox"/> Pennsylvania	

<input checked="" type="checkbox"/> All U.S. Territories and Outlying Areas (Selecting this box is equal to checking all boxes below)	
<input type="checkbox"/> American Samoa	<input type="checkbox"/> Northern Marina Island
<input type="checkbox"/> Federated States of Micrones	<input type="checkbox"/> Puerto Rico
<input type="checkbox"/> Guam	<input type="checkbox"/> U.S. Virgin Islands
<input type="checkbox"/> Midway Islands	

<input checked="" type="checkbox"/> All Canada Provinces and Territories (Selecting this box is equal to checking all boxes below)	
<input type="checkbox"/> Alberta	<input type="checkbox"/> Prince Edward Island
<input type="checkbox"/> British Columbia	<input type="checkbox"/> Quebec
<input type="checkbox"/> Manitoba	<input type="checkbox"/> Saskatchewan
<input type="checkbox"/> New Brunswick	<input type="checkbox"/> Northwest Territories
<input type="checkbox"/> Newfoundland and Labrador	<input type="checkbox"/> Nunavut
<input type="checkbox"/> Nova Scotia	<input type="checkbox"/> Yukon
<input type="checkbox"/> Ontario	

If awarded a Master Agreement, will your company extend the terms offered in your Proposal to public agencies in Canada? If no or maybe, please explain.

Yes Maybe No

All clients are required to go through our internal client acceptance process.

If awarded a Master Agreement, will your company extend the terms offered in your Proposal to private sector customers?

Yes Maybe No

All clients are required to go through our internal client acceptance process.

Minority and Women Business Enterprise (MWBE) and (HUB) Participation

It is the policy of some entities participating in NCPA to involve minority and women business enterprises (MWBE) and historically underutilized businesses (HUB) in the purchase of goods and services. Respondents shall indicate below whether or not they are an M/WBE or HUB certified.

Minority/Women Business Enterprise
Respondent Certifies that this firm
a Minority / Women Business Enterprise

Historically Underutilized Business
Respondent Certifies that this firm is a
Historically Underutilized Business

Small Business, MWBE and HUB Growth

If Proposer is a Large, National or Multinational Organization/Corporation, what programs are in place that partners or supports the growth of small and MWEB and HUB business? If yes, please describe.

N/A, we are a recognized small, MWEB or HUB organization

No, we do not have any programs in place.

Yes, we have programs in place.

Residency

Responding Company's principal place of business is in the city of Houston,
State of Texas.

Felony Conviction Notice

Please Check Applicable Box (If the 3rd box is checked, a detailed explanation of the names and convictions must be attached):

- A publicly held corporation; therefore, this reporting requirement is not applicable.
- Is not owned or operated by anyone who has been convicted of a felony.
- Is owned or operated by the following individual(s) who has/have been convicted of a felony

Distribution Channel

Which best describes your company's position in the distribution channel:

- Manufacturer Direct Certified education/government reseller
- Authorized Distributor Manufacturer marketing through reseller
- Value-added reseller Other: Professional Services

Processing Contact Information

Contact Person Alyssa Martin, CPA

Title Partner | National Strategy Leader, Large Market & Public Entities

Company Weaver and Tidwell, L.L.P.

Address 2300 North Field Street, Suite 1000

City/State/Zip Dallas, TX 75201

Phone [REDACTED]

Email _____

Pricing Information

In addition to the current typical unit pricing furnished herein, the Vendor agrees to offer all future product introductions at prices that are proportionate to Contract Pricing. If answer is no, attach a statement detailing how pricing for NCPA participants would be calculated for future product introductions.

- Yes No

Pricing submitted includes the required NCPA administrative fee. The NCPA fee is calculated based on the invoice price to the customer.

Yes No

Cooperatives

List any other cooperative or state contracts currently held or in the process of securing.

Cooperative/State Agency	Discount Offered	Expires	Annual Sales Volume

Both of these cooperative contracts were awarded based on qualifications, rather than pricing. They do not include pre-negotiated discounts or rates.

Weaver has served clients under the DBITS contract since 2014, and we have in place the necessary mechanisms to track and pay administrative fees such as NCPA's.

Tab 4 – Vendor Profile



Meet Weaver

Official Registered Name: Weaver and Tidwell, L.L.P.
Dun & Bradstreet (D&B) Number: 073141897

Founded in 1950, Weaver has been providing assurance and advisory services to government entities for more than seven decades.

With 14 offices from coast to coast and more than 1,000 professionals, we're committed to helping our government clients deliver for their constituents, while bringing a long-term perspective to help improve their operations and services. By helping clients build mature, strategic processes and governance, we position them to effectively address problems, flag potential issues such as fraud or loss, and achieve their mission.

At Weaver, there are no "one-size-fits-all" solutions. We combine leading technical knowledge with specific industry experience to provide highly customized services tailored to each client's needs.

Industries

- ▶ Government
- ▶ Not-for-profit
- ▶ Higher Education
- ▶ Real Estate
- ▶ Construction
- ▶ Hospitality
- ▶ Healthcare
- ▶ Professional Services
- ▶ Private Equity
- ▶ Insurance
- ▶ Technology
- ▶ Alternative Investments
- ▶ Financial Services
- ▶ Financial Institutions
- ▶ Manufacturing & Distribution
- ▶ Oil & Gas
- ▶ Oilfield Services
- ▶ Renewable Energy

Services

- Advisory & Consulting Services**
 - ▶ Risk Advisory Services
 - ▶ IT Advisory Services
 - ▶ Government Consulting Services
 - ▶ Asset Management Consulting
 - ▶ Client Advisory Services
 - ▶ Transaction Advisory Services
 - ▶ Forensic & Litigation Services
- Assurance Services**
 - ▶ Audit, Review & Compilation
 - ▶ Agreed-Upon Procedures
 - ▶ Employee Benefit Plan Audit
 - ▶ SOC Reporting
 - ▶ Attestation Services
 - ▶ IFRS Assessment & Conversion
- Tax Services**
 - ▶ Federal Tax
 - ▶ State & Local Tax
 - ▶ International Tax
 - ▶ Private Client Services



Best of the Best Firms (2021)
Inside Public Accounting



SCAN ME

Our goal is to balance high engagement with high performance to meet the long-term goals of each individual, team and our firm, and every person plays a part. Our core values drive virtually everything we do here at Weaver — the way we work, the way we operate and the way we serve our clients.

Our Core Values

Take initiative. Lead. Always think about how we can improve.	Do work you're deeply proud of, as if Weaver were your business.	Act with integrity, no matter what.	Strive to transcend client expectations, always.	Be adaptable and innovative in all that you do.	Help each other succeed at work and in life.	Respect everyone for who they are and what they contribute, no matter how different.	Keep perspective: Be passionate and diligent, and have fun.

Government Consulting Services (GCS)

Weaver's Government Consulting Services team has the skills and experience needed to assist clients in addressing multiple and often competing needs.

Our results-oriented approach supports organizations in undergoing transformational operational and financial change and modernizing in IT, human resources, governance and other areas. From capital projects and economic development initiatives, to disaster recovery readiness and setting and achieving environmental, social, and governance (ESG) goals, Weaver implements innovative tools for operational excellence.

Our team's experience and structure are geared to support the need for rapid response, efficient execution, and cost-effective delivery of services – and our clients know they can count on us to provide services that offer value from strategy to execution while keeping compliance and risk management top of mind throughout the project life cycle.

Now's the time for government entities to **develop innovative programs and processes** that have meaningful impact on all of our lives. From critical infrastructure to the environment, economic development, sustainability and equitable solutions to long-term concerns and disaster recovery programs, **we're living in a time of opportunity to make a sustainable difference.**

Services Tailored to Governmental Needs

Government entities face a myriad of unique challenges — meeting demands for transparency, balancing the competing needs of multiple stakeholders and maintaining prudent stewardship to uphold the public's trust.



In these high visibility environments, executing large-scale change requires fresh approaches and effective ways to manage risk and report results. Not only does the federal government demand better reporting from states and municipalities, citizens want more transparency and accountability. They want to know *how*, *when* and *where* their tax dollars are being put to work for them.

When *efficiency*, *transparency*, and *accountability* matter, Weaver's GCS team delivers the results you need. As a trusted professional services provider to federal, state and local government entities, Weaver offers a full range of consulting, advisory and assurance services to federal agencies, state entities and local governments including major cities, special authorities, counties and school districts.

Our GCS professionals are highly regarded for supporting government clients in addressing problems, achieving compliance, and preventing fraud or loss. Our knowledge and experience in the government industry delivers impact and value to a world of complex regulations.

The team's core services, available to governments of all sizes, suites of services in four primary areas: **Strategy**, **Operations**, **Technology**, and **Human Resources**.

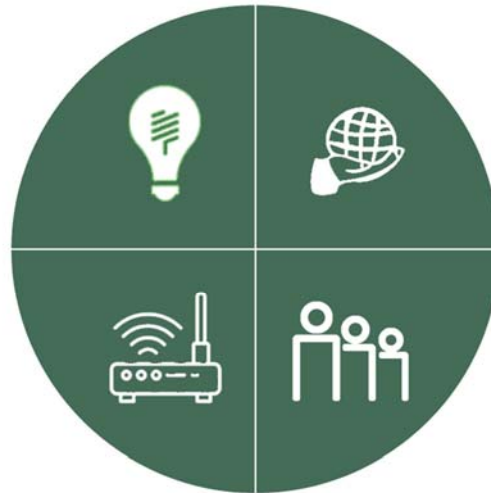
The Four Pillars of Weaver GCS

Strategy

- Workforce Planning
- Organization Planning
- IT and IS Strategy
- Data Architecture and Management
- Visual Analytics
- Strategic Planning for Governments

Technology

- Project Management
- Cybersecurity
- Data Architecture
- Data Warehousing
- Cloud Strategies
- Data Verification and Validation



Operations

- Business Process Improvement & Re-Engineering
- Shared and Managed Services
- Risk Management
- Change Management
- Infrastructure Management
- Grant Funding Management

Human Resources

- Human Capital Strategy
- Talent Management and Rewards
- Organizational Design
- ESG and DEIB Goals and Fulfillment
- HR Analytics
- Change Communications
- Learning and Development

Advisory Services Focus

Weaver's Advisory Services practice is made up of dedicated professionals who focus on helping clients establish governance, manage risk and maintain compliance.

Weaver's **Risk Advisory Services** professionals are recognized for their breadth and depth of experience in all phases of risk management, from internal control evaluations over individual processes to complete enterprise risk management.

They bring many years of experience performing risk assessments, and providing co-sourced and outsourced internal audit services for a wide of variety clients — including numerous government entities.

The professionals in our robust **IT Advisory Services** group have extensive experience providing internal audit, cybersecurity and other IT-focused assessments.



Governance
Risk Assessment
Internal Controls



Risk
Enterprise, Entity-Level and
Process-Level Risk Assessments,
Internal Audit



Compliance
Program Development,
Review, Program Monitoring,
Sarbanes-Oxley Services



Performance
Business Process Analysis,
Business Process Improvement,
Performance Audit, Quality
Assurance Review



**Government Consulting
Services**
Strategy, Operations,
Technology & Human
Resources



**Asset Management
Consulting**
Internal Audit, Compliance, Risk
& Management Consulting for
Investment Advisors & Asset
Managers



IT Internal Audit
Risk assessment
Internal controls



Cybersecurity
Develop, maintain and monitor
up-to-date cybersecurity
programs



**Payment Card Industry
Data Security
Standards**
Comply with credit card
security requirements



**CIO Advisory
Services**
Strategic and organizational
guidance



**SOC Examination
Services**
SOC 1, 2, and 3
SOC for Cybersecurity
SOC for Supply Chain



IT Compliance
Meet your industry's standard
framework: HIPAA, PCI, FDICIA,
GLBA, CCPA, NIST, ISO 27001
and more



Consulting
Organization, strategy,
implementation or problem-
solving



**Digital Transformation &
Business Automation**
Find the answers hidden in
data you already have

Representative Government/Government-Funded Clients

We provide a myriad of advisory, consulting and assurance services to the following clients:

[Redacted client list]

Representative Current Not-for-Profit Engagements

The following is a representative list of not-for-profit clients for whom we provide a myriad of advisory, consulting and assurance services:

[Redacted client list - Column 1]

[Redacted client list - Column 2]

[Redacted client list - Column 1]

[Redacted client list - Column 2]








[Redacted client list - Column 1]

[Redacted client list - Column 2]

Organizational Charts

The chart below illustrates the key leaders proposed for Region 14 ESC and other NCPA participants:

The Weaver Team

 <p>Alyssa G. Martin, CPA Relationship Partner Scope Co-Lead</p> <p>Scope Lead: 8, Building Resilience & Crisis Response 9, Transforming Back-Office Functions 16, Managing Risk</p>	 <p>Todd Hoffman Engagement Leader Primary Point of Contact</p> <p>Scope Lead: 2, Modernizing Public Safety 11, Creating a Better Citizen Experience 13, Delivering Effective Strategies & Plans</p>	
 <p>John Wauson, CPA Scope Lead</p> <p>Scope Lead: 1, Achieving a Better State of Health</p>	 <p>Adam Jones Scope Lead</p> <p>Scope Lead: 5, Educating Citizens for the Future 15, Transforming Organizations</p>	 <p>Brandon Tanous, CIA, CFE, CGAP, CRMA Scope Lead</p> <p>Scope Lead: 3, Building Infrastructure/21st Century 8, Building Resilience & Crisis Response 10, Driving Operational Transformation</p>
 <p>Daniel Graves, CPA Scope Lead</p> <p>Scope Lead: 12, Addressing Capital Productivity 14, Applying Advanced Analytics</p>	 <p>Morgan Page, CIA Scope Lead</p> <p>Scope Lead: 14, Achieving a Better State of Health</p>	

Team Members

 <p>IntegerHealth</p> <p>Scope Partner: 1, Achieving a Better State of Health</p>	 <p>FORESITE group</p> <p>Scope Partner: 3, Building Infrastructure/21st Century 12, Addressing Capital Productivity</p>	 <p>The Goodman Corporation</p> <p>Scope Partner: 3, Building Infrastructure/21st Century</p>
 <p>Alvarez & Marsal</p> <p>Scope Partner: 3, Building Infrastructure/21st Century</p>	 <p>Results Mass Ingenuity</p> <p>Scope Partner: 2, Modernizing Public Safety 9, Transforming Back-Office Functions 10, Operational Transformation 11, Better Citizen Experience 13, Effective Strategies and Plans 14, Applying Advanced Analytics</p>	

Summary bios for key Weaver leaders are provided below; more information about their scope-relevant experience, as well as resumes of other staff members and our partner firms, can be found in Tab 5 – Products and Services.

Considering the breadth and potential geographic scope of this MSA, we anticipate that other professionals will be needed, as well. Our engagement leaders will reach across the organization's 14 U.S. locations, as well as to our subcontractors, to engage professionals with the appropriate experience to ensure the best resources are deployed. Region 14 ESC and any other participating NCPA organizations will be served by Weaver's capable professionals across all service lines, regions and disciplines.



Alyssa G. Martin, CPA | Scope Co-Lead: Building Resilience & Crisis Response (#8), Transforming Back-Office Functions (#9) and Managing Risk (#16)
National Strategy Leader: Large Market and Public Entities

Alyssa leads strategic, multi-disciplinary solutions for Weaver's large clients nationwide. Previously the partner-in-charge of Risk Advisory Services for the firm, Alyssa now leverages her rich experience to assist organizations in managing risk, establishing governance and strategy, preventing fraud, ensuring compliance and improving operations. In addition, she facilitates delivery firm wide to coordinate Weaver's different services for such clients to improve communications and efficiency.

With more than 25 years of experience in public accounting, is widely recognized for her work collaborating with management teams on growth strategies and governance matters. Alyssa has deep knowledge and experience in internal audit, risk management, operational analysis, quality assurance reviews, fraud prevention, IT audit, business management consulting, strategic planning and technology consulting. She has many years of experience working directly with school districts, municipalities, regional entities, state agencies and other complex government clients, and understands the unique needs of these environments.



#8 Scope Lead



#9 Scope Lead



#16 Scope Lead



#3 Resource



#5 Resource



#10 Resource



#11 Resource



#12 Resource



#13 Resource



#14 Resource



#15 Resource

Representative Client Experience

[Redacted client experience text]

Professional Involvement, Additional Certifications and Education

- Member, Institute of Internal Auditors (IIA), North American Board
- Global Academic Committee Member, Institute of Internal Auditors (IIA) Board
- Editorial Board, IA Magazine
- Member, American Institute of Certified Public Accountants (AICPA), Texas Society of Certified Public Accountants (TXCPA) and TXCPA Audit Committee and Board Member
- Trustee, Accounting Education Foundation, TXCPA
- Editorial Board, Today's CPA magazine of TXCPA
- Member, Internal Audit Education Program (IAEP) Advisory Committee at the University of Texas at Dallas (UTD)
- Executive Advisory committee, accounting and information management area, University of Texas at Dallas School of Management
- Audit and Finance Committee, Investment Committee and Board Member, State Fair of Texas
- Audit Committee Board Member, Big Brothers Big Sisters, Lone Star
- Member, National Association of Corporate Directors (NACD)
- Master of Business Administration and Bachelor of Business Administration, accounting, UTD

Representative Presentations and Publications

- "Changing Role of Government Leaders – Strategy, Motivation and Efficiency," *Weaver: Beyond the Numbers* Podcast
- "How Are You Doing...Really? Cultural Insights From Organizational Assessment," Weaver Wednesdays – Government CPE Series Webinar
- "Building an Inclusive and Diverse Not-for-Profit Board," Weaver: Beyond the Numbers Podcast
- "Corporate Good Citizenship: Meeting Expectations for Environmental, Social and Governance Reporting," Weaver Blog
- "Excelling Together 2020: Panel Discussion – Building an Inclusive and Diverse Board," Weaver Not-for-Profit CPE Series
- "Setting People Up for Success" Weaver: Beyond the Numbers Podcast
- "Why I'd Like to Inspire a Movement to Increase the Diversity Among Those Serving on Public Company Boards of Directors," *Authority Magazine* and *Thrive Global*
- "The Evolving CFO: Effectiveness Across a Broad Span of Control," Weaver Blog
- "Lonely at the Top: The Expanding Role of the Government CFO," Weaver Blog
- "What's Going On Around Here? Assessing Your Organization to Improve Performance," Weaver Blog
- "Organizational Issues that Impact Performance," Weaver Government CPE Day
- "Ethics and Governance in Government," Weaver Government CPE Day
- "Building the Audit Function," Ia: Internal Auditor
- "Grant Administration – Keys to Knowing and Understanding the Compliance Requirements," Weaver CPE
- "Integrating a Culture of Ethics," IIA Half-Day Seminar and UT Dallas/IIA Dallas Fraud Summit
- "Are We Having Fun Yet? Organizational Issues that Impact Performance." Texas Association of School Business Officials (TASBO)



Strive to transcend client expectations, always.

Alyssa says: "My favorite core value is **Strive to transcend client expectations, always.** I appreciate hearing from my clients that we made a difference in their success."



Todd Hoffman | Primary Contract Point of Contact

Scope Lead: Creating a Better Citizen Experience Including Digitization (#11) and Developing Effective Strategies and Plans (#13)

Partner, Government Consulting Services



#11 Scope Lead

Todd has 34 years of consulting experience successfully delivering results for local and state government entities. He has led large-scale projects in business process improvement, financial and organizational assessments, grants management technology implementations, workforce development, stakeholder outreach and inclusion, employee engagement and change management and communications.



#13 Scope Lead

Todd is a frequent conference speaker on human capital and various performance improvement topics. He has authored numerous white papers on organizational improvement and grant management, including a recent white paper entitled *Readying State and Local Governments for the \$550B Infrastructure Investment and Jobs Act Funding*, available at [this link](#) or via the QR code.



DOWNLOAD PDF



#8 Resource

Representative Client Experience

[Redacted client experience text]



#9 Resource



#15 Resource

Professional Involvement, Additional Certifications and Education

- Member, Society for Human Resource Management (SHRM)
- Villanova University Essentials of Project Management, Lean Six Sigma and Six Sigma Green Belt
- Bachelor of Business Administration, Accounting, Lamar University



Do work you're deeply proud of, as if Weaver were your business.

Todd says: "My favorite core value is **Do work you're deeply proud of, as if Weaver were your business**. When I enter into a contract with my clients, I take that responsibility personally and strive to lead my team to exceed expectations, while enjoying the work."



John Wauson, CPA | Scope Lead: Achieving a Better State of Health (#1)
Partner-in-Charge, Risk Advisory Services

John has 17 years of experience, with a career-long focus on providing Risk Advisory Services including business process improvement and reengineering, risk management and assessment, internal audit, fraud prevention and outsourced accounting, and financial reporting assistance. As the partner-in-charge of the Risk Advisory practice for the firm, he is also highly focused on client service delivery and takes a hands-on approach with all of his clients.



#1 Scope Lead



#16 Resource

He is deeply experienced with evaluating the design of a process, looking for efficiencies and opportunities to enhance automation, reduce error, and minimize duplication between steps. He regularly assists his clients with designing and implementing internal control structures and activities for a wide-range of strategic, operational, financial and compliance activities.

Representative Client Experience

■ [Redacted]	■ [Redacted]
■ [Redacted]	■ [Redacted]
■ [Redacted]	■ [Redacted]
■ [Redacted]	■ [Redacted]
■ [Redacted]	■ [Redacted]
■ [Redacted]	■ [Redacted]
■ [Redacted]	■ [Redacted]
■ [Redacted]	■ [Redacted]
■ [Redacted]	■ [Redacted]

Professional Involvement, Additional Certifications and Education

- Member, IIA, AICPA and Healthcare Financial Management Association (HFMA)
- Member, UT Dallas Internal Audit Endorsement Program Advisory Board
- Member, TXCPA, Past Chair of its Young and Emerging Professionals Committee and 2014 Rising Star Award Recipient
- Past Chair, Young Professionals Group of the Dallas CPA Society
- Bachelors of Business Administration, accounting, University of Oklahoma

Representative Presentations and Publications

- "Five Key Considerations for Your Next Board of Directors Meeting," Weaver Blog
- "OnRisk: The Top Twelve Risks for 2022," Weaver Blog
- "Integrating a Culture of Ethics," UT Dallas/IIA Dallas Fraud Summit
- "Scoping Your Fraud Risk Assessment," UT Dallas/IIA Dallas Fraud Summit
- "Coordinating Fraud Risk Assessment with Enterprise Risk Management," IIA San Antonio Full-Day CPE
- "Get More Out of Your Risk Assessment," IIA Dallas
- "Assessing Organizational Risk and Evaluating Control Activities," Texas Presbyterian Foundation



Be adaptable and innovative in all that you do.

John says: "My favorite core value is **Be adaptable and innovative in all that you do.** I enjoy working with my clients to develop customized solutions to help them effectively mitigate risk in their organization. A cookie-cutter approach won't do! Every client has different strategies, goals, people, experiences and resources – we work with them to develop practical solutions that work in their environment."



Brandon Tanous, CIA, CFE, CGAP, CRMA | Scope Lead: Building Infrastructure for the 21st Century (#3), Driving Operational Transformation (#10); Scope Co-Lead: Building Resilience & Crisis Response

Partner, Risk Advisory Services

Brandon has over 15 years of internal audit and advisory experience, including extensive work for cities, counties, school districts, government agencies, councils of government, and higher education. His primary focus is on grant and contract monitoring, internal audit, fraud detection, business process improvement, internal control evaluation and risk management. He also has experience conducting quality assessment reviews for state agencies. He is also a compelling public speaker and trainer; he trains and mentors audit and client staff, teaching principles and techniques of internal audit, grant compliance, and risk management.



#3 Scope Lead



#8 Scope Lead



#10 Scope Lead



#5 Resource



#9 Resource



#10 Resource



#16 Resource

Representative Client Experience

<ul style="list-style-type: none"> ■ [Redacted] ■ [Redacted] ■ [Redacted] ■ [Redacted] ■ [Redacted] ■ [Redacted] ■ [Redacted] ■ [Redacted] ■ [Redacted] ■ [Redacted] ■ [Redacted] 	<ul style="list-style-type: none"> ■ [Redacted] ■ [Redacted] ■ [Redacted] ■ [Redacted] ■ [Redacted] ■ [Redacted] ■ [Redacted] ■ [Redacted] ■ [Redacted] ■ [Redacted] ■ [Redacted]
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Professional Involvement, Additional Certifications and Education

- Certified Internal Auditor (CIA), Certified Fraud Examiner (CFE), Certified Government Auditing Professional (CGAP) and Certification in Risk Management Assurance (CRMA)
- Member, Board of Governors and Past President, IIA (Houston Chapter)
- Member, IIA Chapter Relations Committee
- Member, of the Association of Certified Fraud Examiners (ACFE)
- Master of Public Administration and Bachelor of Public Administration, Texas State University

Representative Presentations and Publications

- "Prudent Practices to Reducing Grant Fraud," Weaver: Beyond the Numbers – The Business of Government Podcast
- "Keeping the Pulse on Today's Organizational Risks," Weaver Wednesdays – Government CPE Series Webinar
- "The Value of an Internal Auditor in School District Operations," Weaver Blog
- "Expense Management in Health Care," Weaver Webinar
- "Facility Readiness and Resiliency in the New Normal," Weaver Webinar
- "Another Challenge for Hospitals Facing COVID-19: Healthy Internal Controls," Weaver Webinar
- "Ethics and Governance in Government," Weaver Government CPE
- "Grant Administration – Keys to Knowing and Understanding the Compliance Requirements," Weaver CPE
- "Grant Management: Avoiding Common Pitfalls to Achieve Audit Success," Texas Association of Community College Business Officers (TACCBO)
- "Unusual Suspects: Fraud Committed by Long-Term Employees," IIA Half-Day Seminar
- "Fraud Risk and Control: Recognizing the Prevalence of Fraud and the Importance of Prevention," IIA Houston Government Auditor's Conference
- "How Audits Become Investigations," IIA Austin Chapter
- "Contract and Compliance Monitoring – Building a Successful Program," IIA Houston Government Conference
- "Risk and Control Self-Assessment in your Organization," IIA Austin



Brandon says: "My favorite core value is **Take initiative. Lead. Always think about how we can improve.** The ability to work with clients and our teams to think outside the box for new and creative solutions ensures we not only deliver on our promises, but also provide value that's often unexpected."



Adam Jones | Scope Lead: Educating Citizens for the Future (#5) and Transforming Organizations, Workforce and Culture (#15)

Senior Advisor, Risk Advisory Services

Following a long and distinguished career in state government, Adam has a decade of experience as a management consultant. He brings both broad and deep experience in strategic governance, organizational development, human resources, policy implementation and effective operations management.



#5 Scope Lead

A regular presenter and speaker on leadership and management topics, he is a trained facilitator who fosters productive dialogue among competing views and helps create meaningful and sustainable change. He is a former Deputy Education Commissioner in Texas, where he served as the chief operating officer over the state's department of K-12 education and oversaw two organization-wide assessments and restructures during his tenure. He serves as an invaluable resource for identifying organizational risks.



#15 Scope Lead

Adam is particularly regarded for his experience and insight with regard to managing organizational change and maximizing organizational performance. He understands human resources, contracting and procurement, organization development, finance, accounting, information technology, grants management, external relations, rule-making and risk assessment.

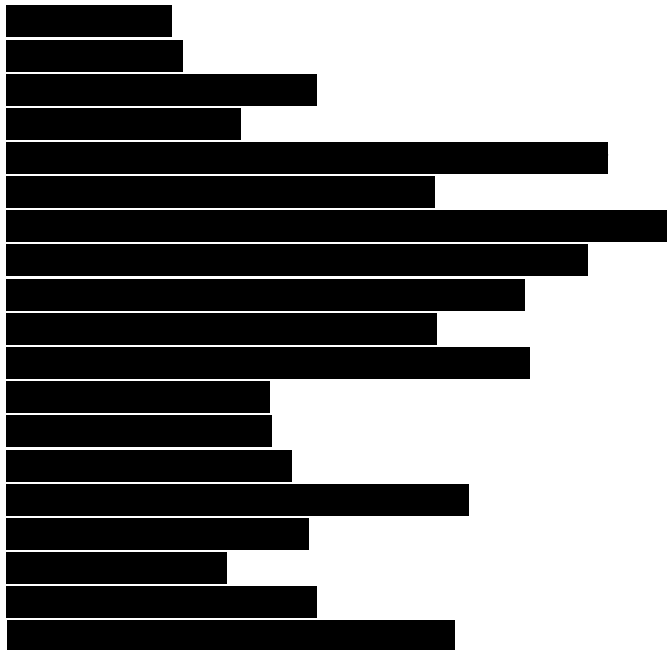


#3 Resource

Representative Client Experience



#10 Resource



Professional Involvement, Additional Certifications and Education

- Master of Arts, public policy, Duke University
- Bachelor of Arts, economics, University of Texas at Austin

Representative Presentations and Publications

- Host of the podcast series *Weaver Beyond the Numbers: The Business of Government*
- “Five Traits of Difference Makers,” Weaver Executive Resource Center Series
- “Interesting Times: The Future of the Texas Political Economy,” Weaver Wednesdays – Government CPE Series Webinar
- “How Are You Doing...Really? Cultural Insights From Organizational Assessment,” Weaver Wednesdays – Government CPE Series Webinar
- “Podcast: Ransomware...What in the World Is Going On?” *Weaver: Beyond the Numbers – The Business of Government* Podcast
- “The Five Traits of Successful Employees,” TASBO 2021 Engage Conference
- “Who’s Zooming Who? How to Build a Great Corporate Culture When Office Work Isn’t Possible,” *Weaver: Beyond the Numbers* Podcast
- “Setting People Up for Success,” *Weaver: Beyond the Numbers* Podcast
- “The Evolving CFO: Effectiveness Across a Broad Span of Control,” Weaver Blog
- “Lonely at the Top: The Expanding Role of the Government CFO,” Weaver Blog
- “Where Are We Going Next? Gaining Insights from Organizational Assessment,” Webinar
- “The Power of Strategic Governance,” *Weaver: Beyond the Numbers* Podcast
- “In Crisis Times, Organizational Capacity Is Both Tested and Triumphant,” *Weaver: Beyond the Numbers* Podcast
- “How Are We Doing Really? Issues in Organizational Assessment,” TASBO Annual Conference
- “School Safety and Resources for Public Schools: A Discussion with Flip Flippen and Adam Jones,” The Flippen Group
- “Texas Is a Dynamic State That’ll Never Stop Surprising,” Weaver: Beyond the Numbers Podcast
- “What Do We Do for an Encore? Fiscal Sustainability in Texas Government,” Weaver Government CPE Day
- “Why Texas Has One of the Nation’s Best Economies,” *Weaver: Beyond the Numbers* Podcast
- “Seeking Higher Ground: Texas Economics & Politics in a Post-Harvey World,” Weaver CPE
- “Are We Having Fun Yet? Organizational Issues that Impact Performance,” Texas State Auditor’s Office Audit Conference and Texas Association of School Business Officials (TASBO)
- “Time to Change Course: Reclaiming the Potential of Texas Charter Schools; A State Case Study,” with Amanda List, Foundation for Excellence in Education



Keep perspective:
Be passionate
and diligent,
and have fun.

Adam says: “My favorite core value is **Keep perspective: Be passionate and diligent, and have fun.** You need to enjoy what you do. Remember the fun part! As an old friend used to remind me: *Lack of a sense of humor is its own punishment.*”



Daniel Graves, CPA | Scope Lead: Addressing Capital Productivity and Capital Management (#12) and Scope Co-Lead: Applying Advanced Analytics (#14)
Partner, Risk Advisory Services

Dan has more than 17 years of experience in public accounting, including 15 years of internal control process and IT risk management. His areas of emphasis include internal audit, risk assessment, construction audits, internal control consulting, business process improvement, and fraud prevention. Dan leads Weaver's Central Texas Risk Advisory Services professionals. As such, he has deep experience with state and federal regulatory requirements, as well as State Auditor's Office (SAO) reporting formats and requirements.



#12 Scope Lead



#14 Scope Lead



#5 Resource



#9 Resource



#16 Resource

Representative Client Experience

[Redacted client experience text]

Professional Involvement, Additional Certifications and Education

- Member, IIA, TXCPA and AICPA
- Bachelor of Business Administration from Hardin-Simmons University

Representative Presentations and Publications

- "Effective Internal Audit Work Starts on Day One," Weaver Blog
- "Community Colleges and Grant Compliance, Updates from the CCBO Conference," Weaver: Beyond the Numbers – The Business of Government Podcast
- "Podcast: Capital Projects: What Could Go Wrong?" Weaver: Beyond the Numbers – The Business of Government Podcast
- "How to Detect and Avoid Overpayments in Construction Projects," Weaver Blog
- "Grant Compliance Done Right!" Weaver Wednesdays – Government CPE Series Webinar
- "Keeping the Lights On: Managing Your District's Cash Flow," Weaver Blog
- "The Human Element: Ethics in the Modern Age," Texas State Auditor's Office (SAO) Conference
- "Effective Construction Monitoring," TASBO Engage 2021
- "Do You Have P-Cards and Credit Cards Under Control?" Weaver Blog
- "Leverage an Auditor's Toolbox for Business Stability in Turbulent Times," Construction Executive, July 2020
- "No Tax Dollar Left Behind: Auditing Third-Party Contracts," Texas SAO Audit Conference
- "Take a New View: Leveraging Your Risk Assessment," Texas Association of Community College Business Officers (TACCBO)
- "Internal Control Tip: Payroll," TASBO Connect
- Ten Keys to Controlling Activity Funds," TASBO Report, Vol. 44, Issue 1
- "Locked from the Inside: Protecting Your Electronic Payments," TASBO Connect
- "Internal Control Tip: Ten Keys to Controlling Activity Funds," TASBO Connect
- "PFIA 85th Legislative Updates and Internal Control Considerations," County Treasurer's Association of Texas Conference
- "Grant Administration – Keys to Knowing and Understanding the Compliance Requirements," Weaver CPE
- "Grant Management: Avoiding common Pitfalls to Achieve Audit Success," TACCBO
- "Building Schools - Strategies for Managing Construction Costs," TXCPA School District Accounting and Auditing Conference
- "Integrating a Culture of Ethics," IIA Austin Half-Day Seminar
- "So You Have Your Baseline Risk Assessment for ERM, What Next?" IIA San Antonio Annual Conference
- "Procurement and Contract Management: Best Practices for Effectively Managing Compliance," Weaver CPE



Help each other
succeed at work
and in life.

Dan says: "My favorite core value is **Help each other succeed at work and in life.** Success doesn't only come in business. Helping others succeed outside of the 8:00–5:00 is just as important as it is during the workday."



Morgan Page, CIA | Scope Co-Lead: Applying Advanced Analytics (#14)
Partner-in-Charge, Digital Transformation and Automation Services

Morgan leads the Digital Transformation and Automation service at Weaver. With 13 years of business experience, he regularly works with organizations at all stages of their digital transformation journey defining and delivering results that are sustainable, scalable and aligned with the needs of the organization.



#14 Scope Lead



#11 Resource

He programs in multiple languages and has an in-depth knowledge of accounting and operations, providing unique insights for his clients. He regularly operates as a subject matter advisor on data visualizations, process automations, application implementations, performing technical analyses, and developing data models. With a wide breath of experience across many different applications and methodologies, he has successfully helped organizations identify and implement the solution best for their operations, whether have billion-dollar annual revenues or are just starting up.

Representative Client Experience

[Redacted client experience text]

Professional Involvement, Additional Certifications and Education

- Certified Internal Auditor and Certified Talent Optimization Consultant (The Predictive Index)
- Member, IIA
- Bachelor of Science, business administration, University of Texas at Dallas

Representative Presentations and Publications

- "Leveling Up Fraud Analytics: Using New Technologies to Catch Old Schemes," Weaver Wednesdays – Government CPE Series Webinar
- "Closing the Deal: Valuation Trends and Best Practices in Oil and Gas," NAPE Magazine
- "Empower Your Operations: Can Artificial Intelligence Drive Efficiencies?" Weaver Webinar
- "Don't Let Hidden Risks Impact Your New Investment," Weaver Blog
- "Facility Readiness and Resiliency in the New Normal" Weaver Webinar
- "How COVID-19 May Affect Non-Financial Businesses Subject to FASB's Credit Loss Standard," Weaver Webinar
- "Preparing for Risk in a Changing Landscape: Business Continuity / Crisis Response," Weaver Webinar



Be adaptable and innovative in all that you do.

Morgan says: "My favorite core value is **Be adaptable and innovative in all that you do**. It is the essence of what we do with our Business Intelligence and Automation service, and we are constantly out in front to help our clients operate faster, better, and more dynamically. Every day we ask, "What did we do today that could be better tomorrow?"



Locations

Weaver has 14 offices across the U.S., as well as a Grand Cayman location. Office addresses and contact information for each office's Executive Partner are provided below:

DALLAS

2300 North Field Street | Suite 1000
Dallas, TX 75201

Executive Partner:

Dale Jensen | Partner-in-Charge, North Texas Assurance Services
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Services Leader
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Executive Partners:

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Elliot H. Levine | Partner-in-Charge, New York City Tax
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GRAND CAYMAN

19 Tarpon Island Drive, Newlands | P.O. Box 1748
Grand Cayman, Cayman Islands, KY1-1109

Although affiliated with Weaver and Tidwell, L.L.P. [US], Weaver and Tidwell (Cayman) is an independent firm located in the Cayman Islands providing accounting and audit services to Cayman Island mutual funds.

Contact Us: caymanfunds@weaver.com

Standard Terms of Payment

Invoices are sent monthly for work completed, and payment is due upon receipt. Other invoicing arrangements may be negotiated depending on contract needs.

Marketplace Competition

As a national CPA firm, Weaver competes for work across the country with a variety of organizations, from local, specialized firms and boutique organizations to members of the Big Four. In the Texas education market, Weaver is known for its excellence.

Our success is all about relationships. At Weaver, strong relationships built with our clients is what keeps us excited to do the work we do every day, on every engagement. Our clients, and the marketplace in general, recognize this as a strength beyond our more commoditized competitors.

Annual Sales

Weaver Client Engagements	FY20	FY21	FY22
Cities and Counties	████████	████████	████████
K-12	████████	████████	████████
Higher Education	████████	████████	████████
Other Government and Not-for-Profits	████████	████████	████████
Total Government/Not-for-Profit:	████████	████████	████████

Anticipated Revenues

Having no experience on this MSA for Region 14 and the NCPA, Weaver cannot specify anticipated revenue for future years. We note that a public information search yielded that one provider has billed \$45 million in one year using this contract vehicle, and Weaver is prepared to mobilize resources to serve very large contract efforts, in Texas and nationwide.

What Differentiates Weaver

No matter the services we provide to our clients, we have heard time and again that our **dedication, integrity, and determination to serve our clients with excellence** stand out as Weaver client service differentiators.

We bring to each engagement the intellectual prowess and proven results of a Big Four firm with the personalized partner-level service that only Weaver can dedicate to our clients in a cost-contained manner. This translate into close, personal attention for each phase of the entire engagement, from day one.

We understand that, above all else, Region 14 ESC and NCPA are seeking **skilled, easy-to-work-with service providers at the best, negotiated group and bulk rates**. Weaver commits to having these goals front and center, no matter which services are needed or when, making it easy for you to obtain the support you need at the right price.

When economies are as volatile as we have been seeing in this last calendar year alone, we know the greater the predictability around cost and quality, the better prepared you will feel to get what you need, when you need, and how you need it.

We don't just assume our clients are satisfied with our service – we ask them.

We regularly send out client satisfaction and feedback surveys to all our clients to evaluate the delivery of our services. In an effort to constantly improve, we're always ready to integrate changes to our processes based on the feedback we receive. Our government clients to this contract rated us highly in two key surveys:

NET PROMOTER SCORE



If a client rates us a 9 or 10, they're strongly likely to recommend Weaver

CLIENT SATISFACTION

98%

**data from the last three years*

98% of our government clients are satisfied or very satisfied with our services

How Weaver Will Market This Contract

As your RFP stipulates, Region 14 ESC and NCPA will take the lead in marketing this contract upon award. As such, we'll work with your stakeholders to learn where, when, and in what manner we can assist with this marketing to your participating agencies. Our experience with other MSAs, such as the Texas Department of Information Resources' DBITS contract, has given us experience with such marketing efforts.



Weaver has a robust, experienced marketing team and an existing client list of 300+ Texas government clients — both current and potential customers — and we look forward to the opportunity to help Region 14 ESC and NCPA communicate the value of its contract vehicles to this audience. With existing relationships in the Texas government marketplace and an expanding national government practice, Weaver can implement an effective and ongoing marketing strategy, as needed.

We commit to getting your approval prior to launching any type of marketing or PR campaign related to the full scope of this work, both during the engagement period and after.

Introducing NCPA to Weaver

Weaver professionals look forward to working with Region 14 ESC and NCPA participants for the period of this MSA and beyond.

Because our underlying belief is that strong relationships are at the heart of our services, we'll introduce Weaver to your people in any manner you prefer. Typically, we hold organization-wide kick off calls for key members of our teams to meet and to interact with one another, setting up schedules to do deeper dives into your teams' needs, communications preferences and ways of working together.

On-Line Catalog / Ordering Website Functionality

N/A – This question does not apply to Weaver's professional services.

Customer Service Department

N/A – Having a Customer Service Department is not applicable to Weaver's professional services. Our standard hours of operation are 8 to 5pm, Monday through Friday. In addition, the partners and teams leading our projects take pride in their accessibility and responsiveness, and they frequently respond to client needs outside those nominal office hours.

Green Initiatives

Weaver is setting a course to reduce our environmental footprint, foster healthy communities and strengthen internal ethics and governance.



The firm is currently compiling a report on these efforts to meet GRI Sustainability Reporting Standards, specifically the Universal Standards (GRI 101, 102 and 103). While this report won't be in full accordance with either the core or comprehensive reporting option, it's intended create a benchmark against which future improvements can be measured.

As a certified public accounting firm, Weaver is subject to the same economic forces and risks, challenges and opportunities as other professional service firms. Because it is a privately held company, Weaver's stakeholders are its partners, employees and clients. There are no market investors, no supply chain, and no physical goods or manufacturing to produce environmental or social impacts. Therefore, the firm's leaders focus on managing risk and maximizing opportunities that provide the best service to clients, meaningful career paths for employees, and lucrative returns to its owners.

Weaver is aware of its contribution to the larger social and environmental impacts created by commercial business as a whole, such as building energy and transportation emissions, particularly carbon emissions due to air travel. The bulk of Weaver's direct environmental impact is due to its office operations, primarily energy use and waste generation.

In the long term, Weaver's leaders understand that the firm can best serve sustainability goals by actions like these:



Optimizing Weaver's own operations to reduce energy consumption from buildings and technology



Raising employees' awareness of best practices such as reducing waste, conserving energy and minimizing car travel or airline miles



Supporting clients to make decisions that are financially sound and reduce both their business risks and long-term global economic, environmental and social risks

Anti-Discrimination Policy

Weaver is committed to creating a work environment that values the contributions of its employees, embraces their diverse backgrounds, cultures and experiences and implements diversity principles and practices.

Our workplace diversity policy recognizes that we all have different qualities, skills, values, qualifications, experiences and beliefs. Valuing and embracing these differences can enhance our work environment, overall organizational performance and the community in which we live.

Workplace diversity maintains the basic principles of Equal Employment Opportunity (EEO) and the Equal Employment Opportunity Commission's (EEOC) standards. Weaver's workplace diversity plan includes measures to address employment and related disadvantages of a number of identified groups. **We would be happy to provide, upon request, copies of our specific policies around anti-discrimination.**

Inspire: Weaver's Inclusion Initiative

Promoting diversity among our staff helps position us as a stronger, more competitive firm in the marketplace. We've created a firmwide, year-round inclusion initiative, called **Inspire**, which is focused on attracting and retaining the next generation of leaders through visibility, progression and advocacy.

Inspire was launched in 2005 as a career development initiative designed to enhance recruitment and retention efforts, while also promoting, motivating and advancing the careers of our female professionals to whatever level they aspired. We recognize that the workforce is more diverse than ever, and all employees face challenges that deserve a platform for discussion and support. So in 2018, the scope of **Inspire** evolved to become inclusive of all people at Weaver, regardless of gender expression. Through **Inspire**, we lift up our entire workforce with resources and programs that are as diverse as our people.

In 2020, Weaver launched the Impact Teams program, inviting staff-level organization of teams to address issues that concern our employees. Four teams were created in the first six months comprising nearly 200 individuals across the firm:



EMPOWER — To discuss specific challenges that women face in the professional services industry



EXPAND THE REACH — To create awareness of under-represented people and channel recruiting efforts to enable more diversity within business majors at universities



COURAGEOUS CONVERSATIONS — To take steps to support multiculturalism in the workplace while educating our employees and building a positive and inclusive work environment




LGBTQ+ AWARENESS AND NETWORKING — To support gay, lesbian, bisexual, transgender and queer/questioning employees, as well as any other employees who want to work toward creating a more inclusive environment at Weaver

At Weaver, we know that genuine inclusion makes our industry, communities and organization better for everyone, which is why we are proud of the gender equality we have achieved, and we continue to work on improving representation of all types.

Insights & Resources | Brochures & Videos

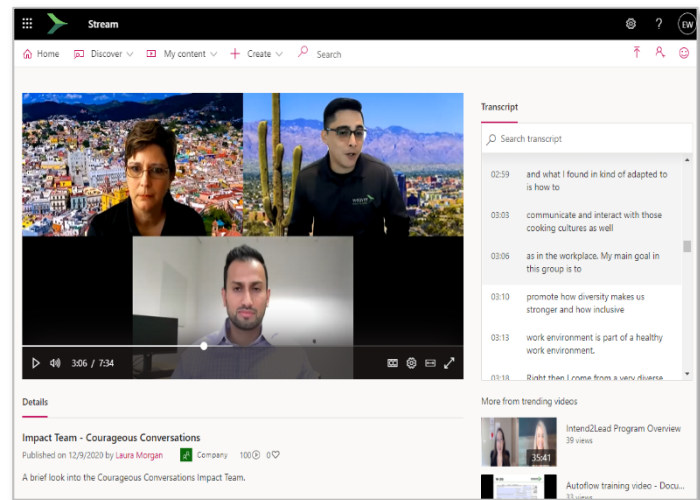
Belonging & Connectivity



We often talk about inclusion and its importance, but also important is belonging, the *emotional outcome* we hope each other *feel* as a result of our focus on inclusion. Belonging liberates us – it makes our voices heard, creates trust and ultimately builds a more stable and innovative work place.

When **Aracely Rios** started with the firm 18 years ago, she was Weaver's only Latina employee in **Dallas**. Yet a sense of belonging, connectivity and support welcomed her with open arms and continued with her along the path to partnership. Today, Aracely has made it her personal mission to advocate for the Latino community at Weaver, so others can feel the same sense of support and advocacy as she did.

In this video, **Dale Jensen** sits down with Aracely to hear her personal story and discuss how we can ensure all individuals not only feel a sense of inclusion, but one of belonging and connectivity.



Stream

Home Discover My content Create Search

Transcript

02:59 and what I found in kind of adapted to is how to

03:03 communicate and interact with those cooking cultures as well

03:05 as in the workplace. My main goal in this group is to

03:10 promote how diversity makes us stronger and how inclusive

03:13 work environment is part of a healthy work environment.

03:18 ...Slight than I come from a user disorde...

Impact Team - Courageous Conversations

Published on 12/9/2020 by Laura Morgan Company 100 0

A brief look into the Courageous Conversations Impact Team.

More from trending videos

Intend2Lead Program Overview 39 views

Autoflow training video - Docu... 33 views

Sample video from the "Courageous Conversations" Impact Team, part of Weaver's diversity and inclusion

"Expand the Reach" – Aracely Rios, CPA, talks about her journey to partner and her ongoing work to recruit new employees from under-represented communities.

Vendor Certifications

Weaver is licensed to practice accountancy in Texas. We are a registrant with the Texas State Board of Public Accountancy under Section 14 of the Public Accountancy Act of 1979, Texas Revised Civil Statutes, Article 41a-1.

We have offices in California, New York, Oklahoma and Louisiana, and are likewise licensed on those. We are able to practice via firm mobility in numerous other locations.

Texas State Board of Public Accountancy 505 E. Huntland Drive, Suite 380, Austin Texas 78752		
WEAVER AND TIDWELL, L.L.P. OFFICE SUITE 1100 4400 POST OAK PKWY HOUSTON TX 77027		
Office License ID: W06392	Firm License ID: P04338	Expires: 5/31/2023

Certifications and Industry Involvement

This engagement will be staffed leveraging our highly experienced, full-time Advisory, Tax, and Assurance Services professionals that stay at the forefront of the industry through ongoing certifications. Some of the many certifications held by our professionals include:

- ▶ Certified Public Accountant (CPA)
- ▶ Certified Internal Auditors (CIA)
- ▶ Certified Information Systems Auditor (CISA)
- ▶ Certified Fraud Examiner (CFE)
- ▶ Certified Government Auditing Professional (CGAP)
- ▶ Chartered Global Management Accountant (CGMA)
- ▶ Certification in Risk Management Assurance (CRMA)
- ▶ Certified Data Privacy Solutions Engineer (CDPSE)
- ▶ Certified Information Systems Security Professional (CISSP)
- ▶ Certified in Risk and Information Systems Control (CRISC)
- ▶ Certified Ethical Hacker (CEH)
- ▶ Cybersecurity Maturity Model Certification (CMMC)
- ▶ GIAC Penetration Tester (GPEN)
- ▶ GIAC Systems and Network Auditor (GSNA)
- ▶ GIAC Forensic Examiner (GCFE)
- ▶ GIAC Certified Windows Security Administrator (GCWN)
- ▶ Certified Information Systems Manager (CISM)
- ▶ PCI Qualified Security Assessor (QSA)
- ▶ Certificate in Cloud Auditing Knowledge (CCAK)
- ▶ Certificate of Cloud Security Knowledge (CCSK)

Our professionals also stay abreast of best practices, industry trends and compliance issues through active participation — including holding key leadership positions — in numerous professional and industry associations, such as:

- ▶ Member, Institute of Internal Auditors' (IIA's) North American Board
- ▶ Member, IIA American Center for Government Auditing
- ▶ Member, Information Systems Audit and Control Association (ISACA)
- ▶ Member, AICPA State and Local Government Expert Panel
- ▶ Executive Committee Member, AICPA Information Management and Technology Assurance (IMTA)
- ▶ Chair, IT Audit Task Force of the AICPA IMTA Executive Committee
- ▶ AICPA SOC for Service Organization School Graduate
- ▶ Committee Member, Institute of Internal Auditors' Learning Solutions Committee
- ▶ Committee Member, Institute of Internal Auditors' Publications Advisory Committee
- ▶ Committee Member, Institute of Internal Auditors' Academic Relations Committee
- ▶ Committee Member, Institute of Internal Auditors' Chapter Relations Committee
- ▶ Member, Institute of Internal Auditors' Southern Regional Conference Committee
- ▶ President, Institute of Internal Auditors' Houston Chapter
- ▶ Member, ISACA North Texas Chapter, Board Member (North Texas Chapter), Past President (North Texas Chapter) and Vice President – Education (North Texas Chapter)
- ▶ Member, International Association of Privacy Professionals (IAPP)
- ▶ Member, Cloud Security Alliance (CSA) Working Groups





Tab 5 – Products and Services



Warranty

N/A – As Weaver is providing professional services, warranty information is not applicable.

Products

N/A – As Weaver is providing professional services, product information is not applicable.

Construction

N/A – As Weaver is providing professional services, construction information is not applicable.

Our Services

The combined Weaver team is bidding on 12 of the 16 services Region 14 ESC and NCPA are seeking in an MSA for as-needed strategic management consulting services.



The following pages describe our services and teams that will be available to participating agencies, organized by the scope areas described in the RFP. Each section lists key points of our basic approach, along with specific references and qualifications of the service leaders.

Our Scope

At the heart of our proposal lies the understanding that Region 14 ESC issued this RFP specifically to achieve:



- ▶ **Best possible pricing** for its region and for all regions and entities of which NCPA encompasses
- ▶ **Visibility** into how services are provided and will benefit your consortium members
- ▶ **Structure** into otherwise disparate methods of procuring and obtaining goods and services across numerous work streams.

Weaver understands these goals and has approached our scoping for each of the 13 areas with them in mind. Additionally, we highlight areas of potential overlap in which we might be able to find additional efficiencies and cost savings for your organizations. As an accounting firm, we feel both compelled and excited to highlight areas where we can help you contain risk.

Whether any of the participating agencies need assistance navigating through the funding opportunities from major, one-time new investments — such as the \$550 billion Infrastructure Investment and Jobs Act — or from ongoing revenue sources, Weaver helps usher in change for public entities, no matter in what area or at what stage of transformation we meet them, throughout these four core organizational functions:



Strategy



Operations



Technology



Human Resources

Weaver professionals adhere to a consistent engagement approach for each offering. Work streams encompass a broad swath of services, from IT strategy and solutions to business process improvement around operating structures and safeguarding capital assets and beyond.

Partnering for Success – Locally and Beyond

Region 14 ESC and NCPA's participating agencies need partnership, collaboration and guidance from professionals who are responsive to the realities facing today's public agencies.

Because our team has a long track record of experience serving clients like you, we know how to provide what you need. We understand how to customize our approach for your unique challenges, leveraging a range of skills from **IntegerHealth**, **Foresite**, **Alvarez & Marsal**, **The Goodman Corporation** and **Mass Ingenuity**. As we are planning and staffing engagements, we always remain mindful of your budget and timing constraints.

With 130 partners and more than 1,000 employees across 14 offices, Weaver offers you the depth of talent and experience of a national firm, without losing sight of our ongoing commitment to hands-on, personal client service.

While we have the resources and experience of the Big Four, our partners don't manage from some far-off corporate headquarters and they don't have to ask permission to provide additional client resources. Rather, the partner and key leadership for each engagement will take an active, hands-on approach every time, from initial planning through execution and final reporting.



We not only communicate with you during specific engagements — we remain available to you throughout the year to answer routine questions and keep you apprised of key technical and regulatory updates. With this added level of year-round guidance, Region 14 and other participants can be confident in our commitment to helping you meet your long-term risk management objectives and strategic goals.

Your experience working with Weaver will be easy and efficient. **You have one primary point of contact for this contract, Todd Hoffman, who is responsible for marshaling whatever resources are necessary to fill the need at hand.** Individual partners and subject-matter advisors for each scope area bring the specific knowledge, skills and staff appropriate to the task.

Our highly skilled subcontractors provide niche experience, and Weaver will coordinate and supervise their work to make sure that it solves the right problem.

Hand-selected to spearhead this endeavor, Weaver Partner Todd Hoffman joined our firm following several decades leading large, public sector consulting groups at PwC and Guidehouse. His several decades of proven experience in the public sector space means our team to serve is ready to bring value and efficiencies from day one. **Todd could have gone anywhere, and he chose Weaver because of its entrepreneurial approach to client service, culture and its excellent brand and reputation in the market.**



Our Project Approach

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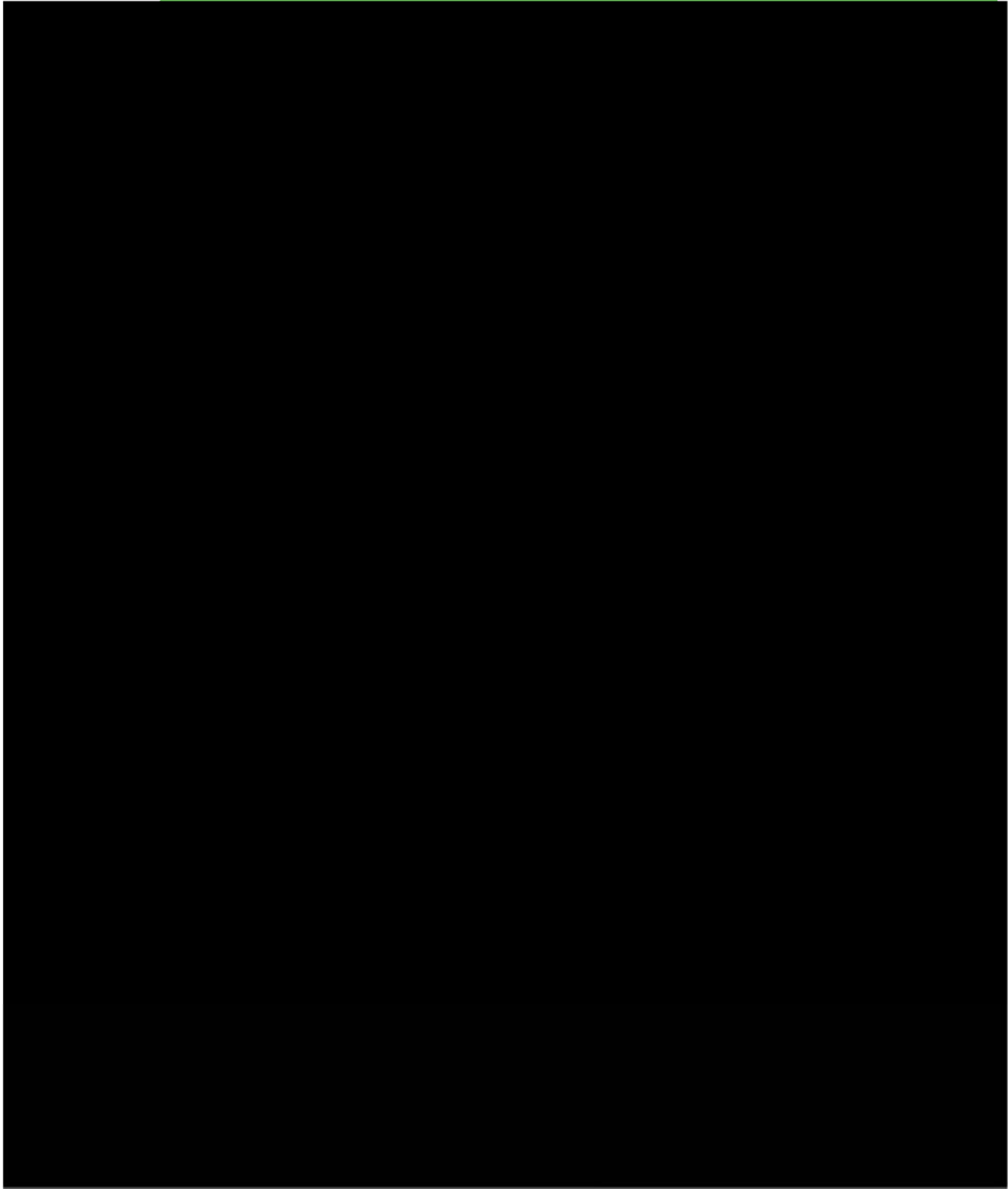


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Our Experience in Action: Sample Projects



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Our Team

The team to serve Region 14 ESC/NCPA is designed to provide both broad capabilities and deep understanding. Todd Hoffman, Weaver's partner in charge of Government Consulting Services, will be your central point of contact, responsible for contract management and ensuring quality in all areas of this contract.

For decades, education agencies, state agencies and non-for-profit organizations have relied on Weaver for assurance, advisory and information technology guidance. Five ESCs, more than 50 school districts, and about two dozen state agencies inside and outside Texas choose Weaver for our knowledge and responsiveness.

Our 14 national locations give Region 14, NCPA and your participating organizations easy access to Weaver's insight, understanding and collaborative approach.

Hand-selected Parties Working as One Weaver Team

To properly address the full scope of services proposed by this MSA, Weaver has tapped a set of knowledgeable partners who bring specialized skills ranging from advanced data analysis to traffic engineering.

These subcontractors are presented below, with more details regarding experience and available team members provided under each specific Scope.

Integer Health

IntegerHealth

IntegerHealth is a health care analytics company that quantifies health care outcomes – something no one else does.

IntegerHealth merges cost and quality into a single dollars and cents value on each outcome, generating actionable analytics that drive down health care costs while improving the quality of care for health plans, wellness programs and workers' compensation.

Several national magazines have featured the team's cutting-edge analytics, including a case study of how IntegerHealth helped reduce the City of Fort Worth's costs by 23%.

Follow [this link](#) or the QR code to learn more about the IntegerHealth difference.



**THE INTEGERHEALTH
DIFFERENCE**

The company's founder, Dr. Jack McCallum, was a neurosurgeon for 30 years before founding health care technology companies, of which IntegerHealth is the fifth. Just prior to IntegerHealth, Dr. McCallum had founded CenseoHealth, which is now called Signify Health and was acquired by CVS for \$8 billion.

Our founder designed IntegerHealth’s solutions to create a quantifiable measure of what really mattered, namely, the outcome to the patient, rather than the qualitative proxies for the outcome used to measure return on health care dollars and to rank providers, such as adherence to clinical-based guidelines and patient satisfaction scores.

The professionals of IntegerHealth take three to five years of historical data from clients, loading it into our proprietary platform. From there, we refresh the data monthly on platforms accessible via Internet portals for health plans, workers’ compensation programs, and wellness programs. The first of these three portals double as data warehouses.

Not only does IntegerHealth provide one-of-a-kind outcome analytics, we guide users through the data and create a story that explains not only *what happened*, but *why it happened*.

Our data warehouse is as robust as it is flexible, presenting results in user-friendly and interactive dashboards and reports with multiple drill-down features and filters.

Foresite Group, LLC



Founded in 2003, Foresite Group provides comprehensive consulting and design services within the disciplines of land development/civil engineering, landscape architecture, MEP fire safety design and engineering, structural engineering, traffic engineering, fiber/broadband engineering, and wireless services.

Our staff of 150 professionals spread over 16 locations are influenced by the everyday connections found within our environment. Inspired by these relationships, our engineers, planners and designers continually collaborate to improve these interaction points and have delivered over 8,000 projects within multiple market sectors. This multi-disciplinary structure has guided our approach to providing comprehensive consulting and design services to our public and private clients nationwide.

Our core values are the guiding principles that form the foundation on which we operate as a firm. In all that we do, we highly value our clients, our service, our people, and our culture.

- ▶ Our Clients: Helping our clients achieve their goals every day
- ▶ Our Service: Excellent service and products through experience and trust
- ▶ Our People: Great associates who deliver on promises and love what they do
- ▶ Our Culture: Continual idea generation and the pursuit of growth opportunities via creativity and a collaborative approach.



The Goodman Corporation (TGC)

Established in 1980 by Barry M. Goodman – Founder and Former President of Houston METRO – The Goodman Corporation (TGC) is a Texas-based professional services firm with a wide range of planning and engineering expertise, project management experience, and unique understanding of the governmental processes for funding and implementing priority projects.



TGC solves mobility, infrastructure, and economic development challenges that impact communities. With a mission to connect capital to communities, TGC connects planning, engineering, and policy expertise to deliver projects when local capital is scarce. We bring a holistic, interdisciplinary approach and understanding to every project.

Since 1980, we have secured over \$1.5B in funding for our client base and have completed over \$3B in projects which provide benefit to the communities in which we live, work, and play.

We excel in performance-based planning, project identification, evaluation, and prioritization using benefit cost analysis, environmental justice, and equity analysis as key components of our process. Complementarily, our engineering staff brings significant experience in engineering planning and design, project and program management, federal compliance, and construction management and administration. With a fundamental expertise in planning, we have the benefit of understanding projects from concept to development, construction implementation and project closeout.

TGC is also an industry leader in the areas of public sector management consulting, procurement, compliance, civil rights, and diversity/equity/inclusion.

We have worked to create many special districts and governmental entities from the Houston Metropolitan Transit Authority of Harris County, the Gulf Coast Transit District, the Galveston County Transit District, and the Fort Bend County Transit District. Our firm has experience standing up these organizations, training them, and also in the areas of providing long-term assistance to help them achieve their mission while remaining compliant with all federal, state, and local requirements. Innovation, feasibility, and practicality are included in every solution we bring to the table.

We are a Small Business Enterprise (SBE) certified by the City of Houston, Houston METRO, and South Central Texas Regional Certification Agency (SCTRCA).

Alvarez & Marsal

In 1983, Tony Alvarez II and Bryan Marsal founded A&M to provide radically different advice and hands-on support geared toward organizations facing mission-critical operational and financial hurdles — situations demanding **leadership, action, clarity, objectivity** and **results**.



They combined their skills and experience in public accounting and financial crisis environments and paved the way for a new specialty area: turnaround management, crisis management and performance improvement for governments and other organizations for the benefit of their constituencies and stakeholders. A&M is focused on the performance improvement of our government clients and delivers five key services through a pragmatic and forward-looking approach. We help our clients:

- ▶ Tackle industry-specific challenges
- ▶ Manage stakeholder expectations
- ▶ Drive financial innovation
- ▶ Strengthen service delivery
- ▶ Improve internal operations & transparency
- ▶ Execute fiduciary services over grants and other federal funds

A&M is a Bronze Partner in good standing of the National Governor's Association (NGA) Partner Program since its inception. The NGA Partner Program provides unique opportunities for companies to demonstrate their commitment to governors and to support innovative leaders solve the challenges facing governments.

“[A&M's progress] was extraordinary. I've never seen anything like it.

- **Kate Brown**, Governor of Oregon



A&M believes in the power of diverse teaming to solve complex problems, create value and drive change, and we deliver projects that meet these same criteria. Our practice group humbly wants to help change the world. We see our professionals' differences as strengths and are committed to fostering a culture of inclusion guided by A&M's Core Values of Integrity, Quality, Objectivity, Fun, Personal Reward and Inclusive Diversity.

Inclusive Diversity runs through how we recruit, develop employees, conduct business and support our clients, as shown below.



Mass Ingenuity

Mass Ingenuity is a full-service and high-touch organization development and enterprise performance management firm. For over 12 years, it has successfully integrated “people, process, and technology” for government clients.

Mass Ingenuity's understanding of agency needs and its approach to problem-solving are grounded in its deep government experience. Since 2009, the professionals of Mass Ingenuity have worked with 85 government agencies, including transportation entities.

The team has partnered directly with hundreds of executives, managers, supervisors and frontline employees, and their work has positively impacted 250,000 FTEs across the U.S. (Arizona, California, Oregon, Pennsylvania, and Washington) and Canada.

Mass Ingenuity understands and respects the mission, journey and challenges facing government agencies, and the complex internal and external stakeholder needs across domains, departments and divisions.

The company's success stories reflect the balance of “people, process and technology.” They are especially proud that their Enterprise Performance Management (EPM) system provides long-term and enduring value. 100% of the clients we have deployed with continue to use, evolve and mature their EPM. The team's focus on change management, transparency and equality has made this long-term track record possible.

“Mass Ingenuity has been instrumental assisting our agency with the Performance System implementation, measuring, and improving our processes. It's been exciting to see staff engagement and leadership teams.”

- Mass Ingenuity Client, Performance System Lead

In essence, they connect everyone in the agency, the customers and the stakeholders as illustrated below:

- ▶ Mass Ingenuity are experts in SaaS-based enterprise performance management software and EPM consulting services for strategy-to-execution excellence
- ▶ Its senior consultants have over 20 years of experience in process improvement, operational and strategic excellence, data analytics, change management, leadership development, and data analytics
- ▶ Its lean-based process improvement work creates value in less than 90 days and generates an ROI consistently in excess of 10:1

THE MASS INGENUITY VISION. Dramatically change the way organizations integrate “people, process and technology” to deliver on their mission and desired outcomes.



CORE PURPOSE. Enable organizations and people to reach their full potential through innovative enterprise performance management software and services.

MASS INGENUITY CORE VALUES

- ▶ The customer experience comes first
- ▶ Hold themselves, partners and customers accountable
- ▶ Respect, value and support each other
- ▶ Practice what they preach
- ▶ Bring passion and energy to all that they do

"I find Mass Ingenuity to be a great firm to work with, both with the staff assigned to the organization directly, as well as their executive leaders. It's been exciting to see the engagement from staff and the leadership teams as we continue this work with the partnership and assistance that they continue to provide. I wouldn't hesitate to work with them again on other projects."

- Mass Ingenuity Client, Deputy Director

Experience Matrix

Weaver's function-specific approach to staffing confirms that you have the right people on your team with the right set of skills and experience for your region's and participating agencies' engagements. Below is an experience matrix showing the skills and knowledge of our team members. We will deploy the right resources for the right work streams, providing the best service team at the best pricing per engagement.

		SCOPE															
		#1	#2	#3	#4	#5	#6	#7	#8	#9	#10	#11	#12	#13	#14	#15	#16
		Achieving a Better State of Health	Modernizing Public Safety	Building Infrastructure for the 21st Century		Educating Citizens for the Future			Building Resilience & Crisis Response	Transforming Back-Office Functions	Driving Operational Transformations	Creating a Better Citizen Experience Including Digitalization	Addressing Capital Productivity & Capital Management	Developing Effective Strategies & Plans	Applying Advanced Analytics	Transforming Organizations, Workforce & Culture	Managing Risk
Person	Position																
Key Team Leaders																	
Alyssa Martin	Partner			●		●			●	●	●	●	●	●	●	●	●
Todd Hoffman	Partner		●	●		●			●	●	●	●	●	●		●	
John Wauson	Partner	●								●	●				●		●
Brandon Tanous	Partner		●	●		●			●	●	●						●
Adam Jones	Senior Advisor			●		●			●		●	●	●	●		●	●
Dan Graves	Partner		●	●		●			●	●		●	●		●		●
Morgan Page	Partner								●			●			●		●
Supporting Professionals																	
Anna Stevens	Partner	●															
Sara Dempsey	Partner					●						●	●				●
Jennifer Ripka	Partner					●											
Reema Parappilly	Partner					●				●	●				●		
Marci Sundbeck	Senior Consultant															●	●
Bruce Mills	Director					●							●			●	
Jason Berkenpas	Director												●				
Rick Astray-Caneda	Senior Manager		●	●					●			●		●		●	
Holly Hart	Manager										●						●
Yoram Kappel	Senior Manager	●															
David Butler	Manager			●									●				
Michael Karnes	Manager			●													
Prasad Gaitonde	Manager														●		
Tracy Schultz	Manager														●		
Jennifer Garrett	Senior Associate		●						●								
Destiny Jasso	Senior Associate												●				
Subcontractors																	
IntegerHealth		●															
Foresite Group				●									●				
Alvarez & Marsal				●													
The Goodman Corporation				●													
Mass Ingenuity			●							●	●	●		●	●		

1. Achieving a Better State of Health

At its core, health care is about patient care and health care administration is critical to the organization's success.

In an industry facing constant market-driven, regulatory and clinical changes, disruptions to your operations can impact your ability to deliver services.

With more than seven decades of experience providing a complete range of assurance and advisory services to health care clients, Weaver is able to leverage our firm's full breadth of knowledge and best practices to benefit your organization now and in the future.

Through our active membership in the Healthcare Financial Management Association (HFMA) and Association of Healthcare Internal Auditors (AHIA), we stay abreast of industry trends and best practices. Our dedicated accounting professionals help you manage your specific reporting requirements and navigate the ever-changing landscape of industry regulations, so you can focus on what matters most.





Healthcare is a constantly evolving and improving industry and the volume of data available to direct and support operational healthcare improvement is staggering. Weaver and the IntegerHealth team have the skills to organize and analyze available data and morph it into **meaningful information that supports advancements in healthcare operations.**



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In an IoT World, Is Your Health Care Data Secure?

THOUGHT LEADERSHIP

HEALTH CARE WEBINAR

Provider Relief Fund (PRF) Reporting Is Fast Approaching, Are You Ready?

WEDNESDAY, SEPTEMBER 15, 2021

weaver

UPCOMING SPEAKING ENGAGEMENT

Options to Develop or Improve Behavioral Health Strategies

Presented by **Corey Palasota, CFA**
Managing Director, Health Care Valuation Services

HFMA Region 9 Annual Conference
Sheraton New Orleans
October 31 - November 2, 2021

hfma
region 9

Hospital Expense Statistics Illustrate Significant Labor Pressures

September 22, 2022

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Medical Center Health System
Your One Source for Health

BUCKNER
RETIREMENT SERVICES

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Weaver Lead



John Wauson, CPA | Partner-in-Charge, Risk Advisory Services

John has 17 years of experience, with a career-long focus on providing risk advisory services, particularly to government and health care organizations. He is a member of the Healthcare Financial Management Association (HFMA).

Representative Clients: [Redacted]

John's full resume is available in Tab 4 – Vendor Profile

Partnering for Success: IntegerHealth **Integer**Health

Weaver will be partnering with IntegerHealth for this engagement. For an overview of IntegerHealth, please see *Tab 5 – Our Products and Services, Our Services, Partnering for Success.*

Our Experience



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Our Team



Anna E. Stevens, CPA, CHFP | Subject Matter Resource: Health Care
Partner-in-Charge, Health Care Services

Anna has more than 10 years of experience providing accounting services to health care organizations. She has served clients in a variety of health care entities, including physician practices, ambulatory clinics, acute care hospitals, post-acute care facilities, as well as biotech companies. Anna formerly served as the corporate controller for an \$80 million post-acute health care system, where she managed the operating budget, prepared financial statements and helped department leaders manage their individual operating budgets.

While working as a public accountant, Anna has managed audits for organizations with up to \$100 million in net patient service revenues, and has vast experience with complex engagements such as provider relief funds, stock option grants, start-up accounting, and purchase price allocations.

Representative Clients: [Redacted]

Professional Involvement, Additional Certifications and Education

- Member, TXCPA and its Advanced Health Care Conference Committee
- Member, AICPA and Healthcare Financial Management Association (HFMA)
- Board Member, HFMA Texas Gulf Coast chapter
- Certified Healthcare Financial Professional (CHFP)
- Master of Science, accounting, and Bachelor of Science, accounting, Sam Houston State University

Representative Presentations and Publications

- "Providers Have Unanswered Questions Ahead of COVID-19 Grant Reporting Deadline," Modern Healthcare
- "What Provider Relief Fund Recipients Should Be Doing to Meet Revised HHS Reporting Requirements," Healthcare Business Today
- "Providers Getting Pummeled In COVID-19 Property Insurance Lawsuits," Modern Healthcare
- "Billions in Federal Provider Relief Funds Have Been Distributed. Now Comes Auditing and Compliance," Healthcare IT Consultant
- "Provider Relief Funds Continue to Flow into Nation's Healthcare System," Managed Healthcare Executive
- "Op-ed: Coronavirus funds for health care providers bring headaches with relief," Houston Business Journal
- "Guide to Financial Arrangements of Health Care Management Services Organizations," American Health Law Association, the 2020 Health Care Financial Management Resource Guide
- "HHS Releases Reporting Requirements with Changes for Provider Relief Fund Recipients," Healthcare Business Today
- "Healthcare Needs to be Ready for a Federal Relief Audit," D CEO Healthcare Magazine
- "Bridging the Gap between the Finance Team and the Clinical Team," HFMA Annual Conference



Yoram Kappel, CA | Health Care Operations

Senior Manager, Risk Advisory Services

Yoram has more than nine years of advisory experience, including internal audit, enterprise risk, SOX and fraud risk assessments for diverse clientele and industries. Yoram regularly leads teams in the coordination and delivery of internal audit programs, including risk assessments delivery and internal audit plan development, execution and reporting.

Additionally, he has extensive experience evaluating internal control structures and environments, including assessing internal controls for end-to-end business processes and reporting on improvement opportunities. Yoram is passionate about business partnering to promote risk awareness and receptiveness to internal control and compliance functions and activities. He is deeply familiar with standards and frameworks that guide internal auditing and risk management.

Representative Clients: [REDACTED]

Professional Involvement, Additional Certifications, and Education

- Chartered Accountant (CA)
- Member, IIA, Association of Healthcare Internal Auditors (AHIA) and Dallas Regional Chamber Young Professionals
- Bachelor of Business, accounting, and Bachelor of Business, banking and finance, Monash University

Representative Presentations and Publications

- "What Provider Relief Fund Recipients Should Be Doing to Meet Revised HHS Reporting Requirements," Healthcare Business Today
- "Provider Relief Fund (PRF) Reporting is Fast Approaching, Are you Ready?" Weaver Webinar



Jack McCallum, M.D., Ph.D. | IntegerHealth
Chief Executive Officer

Dr. Jack McCallum has worked as a practicing adult and pediatric neurosurgeon for more than 30 years, building the premier specialty practice in his area. Prior to founding IntegerHealth, he was a founder of Integration Health Management Associates, one of the earliest firms using data-driven evaluation of physician performance, and North Texas Specialty Physicians, an independent practice association with its own health plan that marketed its data driven quality programs nationally.

In 2005, Jack was a founding member of Leprechaun, a company that used claims data to assure proper reimbursement for Medicare Advantage plans. In 2009, Jack founded CenseoHealth, a company that provided in-home health risk assessments for Medicare Advantage plans, performing 500,000 exams annually throughout the United States. Jack is also an author and educator, holding a teaching appointment at Texas Christian University (TCU). He has spoken at numerous events and authored several articles and books.

Jack holds a Bachelor of Science from Georgia Tech, an M.D. from Emory University, and a Ph.D. in History from TCU.



Scott Roloff, MBA, J.D. | IntegerHealth
President

Scott is both a CPA and a lawyer, uniquely blending financial, legal and operational experience; and he is also a Certified Management Accountant (CMA), Certified Internal Auditor (CIA), and Chartered Global Management Accountant (CGMA).

Before joining IntegerHealth as one of its co-founders, he was the Chief Financial Officer or General Counsel for companies in the health care, software and telecom industries, and he also led a wireless technology start-up in the Caribbean for tourists unable to use their cell phones while on vacation. Prior to going into industry, Scott was a Corporate Partner at the international law firm of Akin Gump Strauss Hauer & Feld where he focused on M&A, SEC and general corporate matters.

He holds a BBA in Accounting from the University of Wisconsin–Whitewater, an MBA from the University of Texas at Arlington, and a J.D. from Southern Methodist University (SMU), where he was the valedictorian of his law school class.



William McCallum | IntegerHealth
Chief Information Officer

William (“Bill”) McCallum is IntegerHealth’s Chief Information Officer and leads its workers’ compensation practice. Bill has over thirty years of experience in health care, focusing primarily on the development and manipulation of clinical and operational data. Bill’s skill set bridges information technology with clinical understanding.

He has developed a number of health care business intelligence capabilities where discrete data from practice management and electronic medical record systems download into a proprietary “Data Model” and “Data Cube,” supporting operations and clinical improvement with ongoing monitoring across multiple data feeds.

Prior to joining IntegerHealth as one of its co-founders, Bill was the CEO of Integration Concepts, a founding member of Leprechaun, and the CEO of Accountable Analytics. He holds a BSEE from Texas Tech University, and a patent on merging disparate data in healthcare.



Kenny Grifno, Ph.D. | IntegerHealth
Chief Analytics Officer

Kenny Grifno is IntegerHealth’s Chief Analytics Officer. Kenny has over 20 years of experience in information technology, primarily focused on advanced analytics, business intelligence, data warehousing, application development, and big data in the health care industry.

During this time Kenny has worked with insurance companies, state and federal governments, academic medical centers, hospitals, physician groups, and consulting firms, and with employer health plans. He is passionate about innovating new products and solutions that improve patient and provider outcomes by combining the different functional knowledge areas of business, computer programming, data analytics, healthcare, and supply chain. Kenny holds a B.S. and M.S. from UT Dallas and a Ph.D. from Oklahoma State.

Our Approach to Services

- a. Assess current conditions and options for healthcare strategies
- b. Support the design of healthcare innovation models
- c. Support the implementation of innovation models and other priority needs
- d. Help agencies reduce state Medicaid costs through program improvement and stronger medical policies
- e. Deliver health care analytics and data management to support these strategic improvements

General Approach

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2. Modernizing Public Safety

Weaver's Government Consulting Services practice and Mass Ingenuity have teamed up to focus on improving public safety – in particular state corrections agencies – across the nation. Weaver partner Todd Hoffman's and Mass Ingenuity's work has spanned Arizona, Oregon and Washington, including three state adult corrections agencies, a youth authority, and a corrections enterprise's quasi-governmental agency.

As a result, we've developed deep domain proficiency across a range of cultural, operational, leadership, staff, inmate, legislative and social issues, and through our partnerships, we have created a large repository of performance outcome and process measures. **We understand law enforcement's role in maintaining public safety and, ever increasingly, partnering with local communities to co-create local models of police service.** The better law enforcement and communities communicate, the better the latter can serve in as positive and responsive a manner for the benefit of constituents.

We know how to effectively and demonstrably move the needle, and corrections staff we work with can speak to both our quantitative performance improvements and qualitative outcomes across issues such as recidivism, inmate costs, inmate intake case plans, inmate employment and skill development, restitution pay, staff/inmate safety needs, staff morale, staff turnover, wellness and diversity, etc. **As governments look to make justice systems more workable**, our professionals help create efficiencies in these much-needed communications, plans, and fulfillment for the benefit of communities with sustainable funding models at the core.



Todd Hoffman | Scope Lead
Partner, Government Consulting Services

Todd has 34 years of consulting experience successfully delivering results for local and state government entities. He has led large-scale projects in business process improvement, financial and organizational assessments, grants management technology implementations, workforce development, stakeholder outreach and inclusion, employee engagement and change management and communications.

Representative Client Experience:

[Redacted client experience text]

Partnering for Success

Weaver will be partnering with Mass Ingenuity for this engagement. For an overview of Mass Ingenuity, please see *Tab 5 – Our Products and Services, Our Services, Partnering for Success*.



See our recent publication entitled *Case Studies on Achieving Performance Improvement Through the Results Management System*, available at [this link](#) or via the QR code.

Our Experience



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Our Team



Aaron Howard | Mass Ingenuity

Chief Executive Officer and Chief Technology Officer

Aaron brings 15 years in state government consulting and 30 years as a technology executive. As Chief Executive Officer and Chief Technology Officer, Aaron's vision for Mass Ingenuity's enterprise performance management methodology began in 2007 leading to the company's Results Management System™ and Results Software, a cloud-based application for key performance indicators.

Aaron's software vision has been implemented at dozens of government entities, resulting in significant data maturity, operational, strategic and cultural advancements.

Representative Clients: [Redacted]

Education

- Master of Science, electrical engineering/computer science, and Bachelor of Science, electrical engineering/computer science, University of Washington
- Wharton School for Executive Business Studies, Stanford University Graduate School of Business, and Berklee College of Music
- Executive Prosci Certification, 2010



Jim Clark | Mass Ingenuity

Vice President of Professional Services and Senior Consultant

Jim has 12 years with Mass Ingenuity leading its professional services consulting team. Jim is recognized for his diverse skills, including executive and management team facilitation, sponsor and change management, organization development, process improvement, and diversity, equity, and inclusion cultural transformation. Jim has facilitated dozens of 7-Step Lean Process Improvement projects for government clients with consistent results that exceeded clients' expectations.

Jim's focus includes the development and improvement of client's key performance indicators and the custom design of their tailored Results Software application.

Representative Clients: [Redacted]

Education

- Masters of Business Administration, economics and finance, Southern Illinois University, Carbondale
- Bachelor of Business Administration, marketing and finance, Middle Tennessee State University
- Prosci Change Management Certification, 2014



Paul Aljets | Mass Ingenuity
Data Analyst

Paul has worked with the Mass Ingenuity team for 10 years as a researcher and data analyst, including providing internal research for Mass Ingenuity on market and product analysis.

Paul has worked on projects for numerous local and state government agencies. Paul gravitates to a well-rounded and practical approach to research using both quantitative and qualitative methods to solve client problems. He has experience in everything from surveys to agent-based modeling. Paul helped develop the user experience for Results Software and provides clients with their data dashboards and visual analytics.

Representative Clients: [REDACTED]

Education

- Master's degree in Public Policy and Bachelor's degree in Political Science, Oregon State University

Our Approach to Services

- a. Diagnose current performance and define strategies to improve the overall performance of public safety organizations (e.g., corrections, law enforcement), leverage best practices, analytic tools and decision-making, increase use of technology to drive greater operational transparency, develop tools to drive improvements in areas like population management, housing assignment, violence reduction, and improved reintegration.
- b. Develop people/workforce strategies to increase frontline efficiency, to assist in the up skilling of the workforce through capability building and culture change, improve community engagement, and provide objective evaluation and improvement of the performance of front line and back office functions within and across public safety agencies.
- c. Aid in the design of facilities to be cost- and resource-effective, as well as conducive to positive performance outcomes (e.g., reduced incident response time).
- d. Support the implementation of strategies to improve the performance of public safety organizations.

Performance Improvement



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3. Building Infrastructure for the 21st Century

Thanks to recently passed legislation, infrastructure initiatives are seeing an influx of funding at unprecedented historical levels. These come with complex, evolving program requirements and aggressive deadlines to obligate and spend.

Federal compliance requirements related to the American Rescue Plan Act (ARPA) distributions, for example, present new challenges to government clients across the country, including a wide array of fiduciary and regulatory responsibilities; strict and specific guidelines for financial reporting; and grants administration requirements across numerous programs, including transportation and transit, utilities, and broadband.

But with these challenges comes significant opportunity: When in history have our institutions been able to maximize the recovery and beneficial uses of such abundant funding for the benefit of their communities?

Each participating agency under the proposed MSA must balance the need to fulfill federal requirements of this complex new program and make sure that funds are spent in the best possible way to drive resilient and sustainable communities, while also maintaining the highest level of service to their constituents. Administration of federal relief funds is complex and often done under changing requirements – it's not always easy to put them to their best use while managing compliance concurrently.

Weaver's professionals are ready to help participating entities successfully manage the influx of federal funds that are coming or already received every step of the way, from developing the business case, program design and administration and program execution, including close-out procedures that will confirm compliance with federal regulations. By working with Weaver, our clients will be positioned to attract future funding, being ready to properly administer the funds in its already proven, federally compliant processes, including for funds that flow from ARPA coffers.

Historical levels of funding from ARPA alone mean that agencies – like never before – need proven, reliable strategic management consulting services to confirm the funds are being used correctly and in a manner that decreases the chance for waste or fraud while dramatically increasing potential benefits for citizens around infrastructure and more.

Weaver Lead



Brandon Tanous, CIA, CFE, CGAP, CRMA | Scope Lead
Partner, Risk Advisory Services

Brandon has over 15 years of internal audit and advisory experience, including extensive work for government entities providing performance assessments, grant and contract monitoring, internal audit, fraud detection, business process improvement, internal control evaluation and risk management. He also has experience conducting quality assessment reviews for state agencies.

Representative Clients: [Redacted]

Brandon's full resume is available in Tab 4 – Vendor Profile



Partnering for Success

Weaver will be partnering with Foresite Group, Alvarez & Marsal and The Goodman Corporation for this engagement. For an overview of each of these companies please see *Tab 5 – Our Products and Services, Our Services, Partnering for Success.*

Our Experience



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Our Team



Alyssa Martin, CPA | Subject Matter Resource:
Partner, Risk Advisory Services

Alyssa has more than 25 years of experience in public accounting, and is widely recognized for her experience in governance, enterprise risk management and internal control process risk management. Her primary focus is in internal audit, risk management, operational analysis, business management consulting, fraud prevention, IT audit, strategic planning and technology consulting. She has many years of experience working directly with state agencies and other complex government clients, and understands the unique needs of these environments.

Representative Clients:

[Redacted client names]

Alyssa's full resume is available in Tab 4 – Vendor Profile



Todd Hoffman | Subject Matter Resource: Strategic and Grants Management
Partner, Government Consulting Services

Todd has 34 years of consulting experience successfully delivering results for local and state government entities. He has led large-scale projects in business process improvement, financial and organizational assessments, grants management technology implementations, workforce development, stakeholder outreach and inclusion, employee engagement and change management and communications.

Representative Client Experience:

[Redacted client experience]

Todd's full resume is available in Tab 4 – Vendor Profile



Adam Jones | Subject Matter Resource: Strategic Management
Senior Advisor, Risk Advisory Services

Following a long and distinguished career in state government, Adam has approximately ten years of experience as a management consultant. He brings both broad and deep experience in strategic governance, human resources, policy development and implementation and effective operations management. A highly effective facilitator, he serves as an invaluable resource for identifying organizational risks and working with management to facilitate meaningful, sustainable change.

Representative Client Experience:

[Redacted client experience]

Adam's full resume is available in Tab 4 – Vendor Profile



Michael Karnes, CPA | Manager, Risk Advisory Services

Michael has over 14 years of accounting and audit experience. During his time as a senior auditor in the Texas State Auditor's Office (SAO), he became deeply experienced with GAAP and generally accepted government accounting standards issued by the Government Accounting Standards Board (GASB). He has also performed multiple compliance audits for a variety of state and local entities. While at the SAO, he worked on multiple financial statement, single audit, and the consolidated annual financial report audit.

Representative Clients: [Redacted]

Professional Involvement, Additional Certifications and Education

- Member, AICPA and TXCPA
- Masters of Business Administration, corporate finance, Saint Edward's University
- Bachelors of Business Administration, finance, Freed-Hardeman University



David A. Butler, CPA, CISA | Manager, Risk Advisory Services

David has more than 10 years of experience in accounting and advisory roles. Throughout his career, he has managed an internal audit engagements focusing on internal control testing and process improvement. David has also overseen risk assessment engagements that focused primarily on accounting and finance operations.

He also managed three internal audit engagements and presented findings of each to the Board of Education for one of the largest school districts in Missouri. David has also overseen three risk assessment engagements that focused primarily on accounting and finance operations.

Representative Clients: [Redacted]

Professional Involvement, Additional Certifications and Education

- Member, AICPA, IIA (Dallas Chapter) and Information Systems Audit and Control Association (ISACA), North Texas chapter
- Certified Information Systems Auditor (CISA)
- Master of Science, finance, and Bachelor of Business Administration, accounting, Texas A&M University



Lee Comer | Foresite Group
Broadband Engineering Practice Leader

Lee brings over 20 years of experience as a designer, supervisor, and project manager in the telecommunications industry. A native Alabamian, Lee earned his Bachelors and Masters of Industrial Design from Auburn University. Starting as a services technician, Lee progressed through various roles of responsibility and leadership including OSP Network Designer, Special Services Network Manager, Construction Supervisor, Senior Project Manager (PLS/U-verse), and Senior OSP Design Manager over Google Fiber Project responsible for Austin, Texas. Lee translates his knowledge of design, construction, and installation of communication networks into a comprehensive program.

Professional Involvement, Additional Certifications and Education

- Master of Industrial Design, Auburn University
- Bachelor of Industrial Design, Auburn University



Thuy Le Ho | Foresite Group
Design Program Manager

Thuy is a Broadband Engineering Program Manager with Foresite Group. She brings over 16 years of experience in Broadband Network Design and Management. Thuy worked as a Network Designer for four years, providing field and design services to AT&T. Services included routine maintenance of outside plant, service orders, fiber and copper design to new developments and damage work orders. She shifted to management and served as the company liaison to the client, providing weekly reporting and maintaining client satisfaction by consistently meeting the quality and timeliness objectives.

Thuy currently serves as a Program Manager and oversees the Design and Permitting teams across multiple projects. She has managed the City of New Orleans' Institutional Fiber Network project, as well as a fiber densification project for Verizon, where she oversaw design and permitting while working closely with the client to meet timeliness and quality requirement. As the manager on the City of New Orleans project, Thuy has delivered a GIS based high level design for the City's institutional fiber network, technical and strategic assessments, and their business and governance plans.



Arnaldo Blanco | Foresite Group
Chief Engineer

Arnaldo is Chief Engineer for Foresite Group's Broadband Engineering Division. He brings 9 years of professional experience in Telecommunication Engineering & Civil Engineering and is well versed in outside plant design and utility permitting work. Originally from Guaynabo, Puerto Rico, Arnaldo has a Bachelor of Science in Civil Engineering from the Polytechnic University of Puerto Rico and is licensed Professional Engineer with the States of Texas & Washington.

Before joining Foresite Group Arnaldo was a Project Manager working on utility permitting projects for telecom and gas companies with ENCO Consulting. He's also been a Design Manager for Google Fiber's Austin project and an Outside Plant Engineer for multiple projects in his native Puerto Rico.

Professional Involvement, Additional Certifications and Education

- Bachelor of Civil Engineering, Polytechnic University of Puerto Rico
- TX Professional Engineer #126224 and WA Professional Engineer #20106832



Jim Webb, AICP, ENV SP | The Goodman Corporation
Chief Executive Officer

Jim Webb joined The Goodman Corporation in 2012. He is the Chief Executive Officer and is responsible for the oversight of planning, design, and construction phase activities for several special districts and municipal clients. Jim also plays a strong role in developing and maintaining positive intergovernmental relationships between the TGC client base and their respective project partners.

His experience also extends to project and program management, the development of funding and implementation strategies, and compliance with federal rulemaking to include NEPA, Uniform Act, and procurement.

Professional Involvement, Additional Certifications and Education

- Master of Public Administration, University of Illinois at Springfield
- Bachelor of Fine Arts, Urban and Regional Planning, University of Illinois at Urbana-Champaign



Kara McManus | The Goodman Corporation
Civil Rights and Compliance Manager

Kara McManus is the Civil Rights and Compliance Manager at The Goodman Corporation (TGC), and her focus is on Americans with Disabilities Act (ADA) paratransit plans, compliance, procurement, existing conditions inventories, and project management. She also has experience with environmental analyses, transit demand indices, PLOS improvements, ridership demand, demographic analyses, and GIS.

Professional Involvement, Additional Certifications and Education

- Graduate Marketing Certificate Program, Southern Methodist University
- Bachelor of Science, Public Relations, The University of Texas at Austin



Kirk Myers, EIT, PMP | The Goodman Corporation
Senior Associate

Kirk Myers joined The Goodman Corporation in 2018. He primarily serves as a Civil Engineer, supporting the Principal Engineer in developing plans, specifications, and estimates for infrastructure projects and leads the construction management practice of the firm. He also provides strategic and management expertise in support of advance planning studies, funding pursuit, coordination and conduct of public meetings, and project delivery.

Kirk brings significant project and quality management experience to the team, having held leadership positions throughout his career. He has performed organizational and process planning, quality controls and assurance, and risk and resource management.

Professional Involvement, Additional Certifications and Education

- Master of Arts, Urban and Regional Planning, Virginia Commonwealth University
- Bachelor of Science, Civil Engineering, Rose-Hulman Institute of Technology



Chuck Banks | Alvarez and Marsal

Director

Chuck has more than 25 years of experience working with county and municipal governments, as well as state agencies, in planning and implementing a wide range of capital projects utilizing federal funding. His capital planning work has covered the full lifecycle of project development and management, including conducting needs assessments and funding acquisition, detailed project planning and implementation oversight, concluding with compliance monitoring and project close-out.

Chuck's capital planning engagement clients have ranged from mid-sized public bodies to large-population government entities including Harris County, TX and New York City. His longest running project was for the City of Joplin [MO], serving them for nearly nine years managing their \$150M+ comprehensive planning and implementation program following the 2011 EF5 tornado that devastated the community.

Chuck has authored numerous articles and is frequently asked to speak on a wide range of subjects related to his past capital projects engagements, topics have included "Successful Planning and Financing Strategies," "Developing A Community Smart City Plan" and "Proactive Steps for Resilient Communities".

Professional Involvement, Additional Certifications and Education

- International Economic Development Council
- Disaster Recovery International Institute
- Bachelor of Science (Economics), Kansas State University

Our Approach to Services

- a. Assess current performance of infrastructure compared to benchmarks and best practices
- b. Develop a set of strategies and initiatives to improve outcomes
- c. Define needed changes to strategy, processes and operations to improve performance
- d. Support implementation of recommended strategies

Weaver will assess current infrastructure performance to understand it relative to benchmarks and best practices across asset classes (such as roads and bridges, water/water-water, transit, energy, broadband, etc.) and geographies. This assessment will yield potential drivers for lagging or leading performance across asset life cycle.

To do this, we'll conduct a performance review to understand a participating agency's current infrastructure and its performance, benchmarking it to best practices across whichever asset class(es) applies.

Weaver works with each participating agency to determine an agreed-on schedule and timeline for the execution of our performance review procedures. We also work with key stakeholders to obtain all the necessary data and information needed to effectively plan the work and meet the internal, city and state deadlines. Our approach typically has five primary phases:



We apply each of the project phases to each of the proposed services, with the phases and approaches presented on the following pages are given as an example of how we'll conduct a typical engagement.

Key Procedures of Each Project Phase

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4. Creating Jobs and Driving Economic Growth

N/A – Weaver is not proposing on this service.



5. Educating Citizens for the Future

Since our founding in Fort Worth in 1950, Weaver has consistently served our community school districts. As a national firm that now serves major clients like the California State Teachers Retirement System and the University of Texas System, our reach, capabilities and experience have greatly expanded over the last two decades.

But our commitment to our communities and furthering the effectiveness of education has remained steadfast. We've been a partner to school districts, community colleges and universities through thick and thin, helping them become safer, more effective, financially sound, and serving parents, students and educators.

We remain on the forefront of technical changes through consistent industry involvement. Our leaders are active in key professional organizations, including the **Texas Association of School Business Officials (TASBO)**. We also have open communication with organizations like the TEA and are regularly in communication with them regarding any upcoming changes in K-12 education.

Since 2018, Weaver has also provided a monthly column for TASBO's online "Internal Control Tips," including tips for complying with GASB 87, suggestions for managing electronic payments, and ideas for controlling cash. Weaver is a preferred vendor of audit and advisory service for the University of Texas System, Texas A&M University System, Texas State University System and has a broad practice among leading community college systems.

Weaver Lead



Adam Jones | Senior Advisor, Risk Advisory Services

Following a long and distinguished career in state government, Adam has over a decade of experience as a management consultant. He is a former Deputy Education Commissioner in Texas, where he served as the chief operating officer over the state's department of K-12 education and oversaw two organization-wide assessments and restructures during his tenure. A highly effective facilitator, he serves as an invaluable resource for identifying organizational risks and working with management to facilitate meaningful, sustainable change.

Representative Clients:

[Redacted client names]

Adam's full resume is available in Tab 4 – Vendor Profile

Partnering for Success

N/A – Weaver is not engaging a subcontractor for this scope of work.

Our Experience



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Our Team



Brandon Tanous, CIA, CFE, CGAP, CRMA | Subject Matter Resource:
Organizational Effectiveness and Internal Controls
Partner, Risk Advisory Services

Brandon has over 15 years of internal audit and advisory experience, including extensive work for government entities providing performance assessments, grant and contract monitoring, internal audit, fraud detection, business process improvement, internal control evaluation and risk management. He also has experience conducting quality assessment reviews for state agencies.

Representative Clients: [Redacted text block]

Brandon's full resume is available in Tab 4 – Vendor Profile



Dan Graves, CPA | Subject Matter Resource: Higher Education Operations and Finance

Partner, Risk Advisory Services

Dan has more than 17 years of experience in public accounting. Maintaining a primary focus on higher education and state government entities, Dan also leads Weaver's Central Texas Risk Advisory Services professionals. He has extensive experience with financial aid operations, grants and grant management, student services, admissions, Title VI and IX compliance, foundation investments, and THECB reporting requirements.

Representative Clients:

[Redacted client names]

Dan's full resume is available in Tab 4 – Vendor Profile



Alyssa G. Martin, CPA | Subject Matter Resource: Government Operations
National Strategy Leader: Large Market and Public Entities

With more than 25 years of experience in public accounting, Alyssa leverages her rich experience to assist organizations in managing risk, establishing governance and strategy, preventing fraud, ensuring compliance and improving operations. She has many years of experience working directly with school districts, municipalities, regional entities, state agencies and other complex government clients, and understands the unique needs of these environments.

Representative Client Experience:

[Redacted client experience details]

Alyssa's full resume is available in Tab 4 – Vendor Profile



Sara Dempsey, CPA | Subject Matter Resource: K-12 Education
Partner-in-Charge, Government Services

Sara has more than 19 years of public accounting experience and currently leads Weaver's Government Services practice. Her primary emphasis over the course of her career has been governmental accounting and auditing municipalities, councils of governments, school districts and other local government entities.

Representative Clients:

[Redacted client names]

Professional Involvement, Additional Certifications and Education

- Member, TXCA GFOA and its Special Review Committee, and Financial Reporting and Regulatory Response Committee of the GFOA of Texas (GFOAT)
- Member, AICPA State and Local Government Expert Panel
 - Task Force Chair, ARPA Compliance Committee
 - Task Force Member, GASB 87, *Leases* and Financial Reporting Model Exposure Draft
- Member, Accounting Committee of the Texas Association of School Business Officials (TASBO) and Women in Public Finance
- Bachelor of Business Administration, accounting, Texas State University

Representative Presentations and Publications

- "GASB 87: Lease Implementation Has Arrived," Weaver Wednesdays – Government CPE Series Webinar
- "How State and Local Governments Can Use Recent Influx of Coronavirus Recovery Funds under the ARPA," Weaver Blog
- "Five Tips for a Smooth Financial Statement Audit in a Rocky Year," Weaver Blog
- "FBI Alert Highlights Heightened Ransomware Threat to Education Institutions," Weaver Blog
- "Educators Take Note: Expenses for COVID-19 Protective Items May Be Tax Deductible," Weaver Blog
- "IBM Announces \$3 Million Grant Program to Strengthen Cybersecurity in Schools," Weaver Blog
- "Transparency Means More Than an Online Checkbook," Weaver Blog
- "Navigating the Challenges of Implementing GASB 87: Leases," Weaver Blog
- "New Title IX Harassment Rules Took Effect in August," Weaver Blog
- "Preparing for a Successful Year-End Close," TASBO



Jennifer Ripka, CPA | Subject Matter Resource: Financial Management
Partner, Assurance Services

Jennifer has more than 14 years of public accounting experience focused on government entities, including school districts, municipalities and special purpose districts. She has served several complex government entities with greater than \$1 billion in revenues/assets. A member of the GFOA Special Review Committee, she currently serves as engagement partner for nine entities that receive the GFOA award for excellence in financial reporting.

She is also deeply experienced with federal and state single audit requirements, and regularly consults with her clients on the implementation of new accounting standards. In addition to her client obligations, Jennifer serves on the firm-wide Learning and Development Committee and the government services internal peer review team, and leads the firm's annual single audit and governmental accounting trainings.

Representative Clients: [REDACTED]

Professional Involvement, Additional Certifications and Education

- Member, TXCPA, AICPA and the GFOA and its Special Review Committee
- Bachelor of Business Administration, accounting, Texas Tech University

Representative Presentations and Publications:

- "Single Audits: What's New, What's Changing, What's Challenging?" *Weaver: Beyond the Numbers*
- "Confused About How to Calculate the Discount Rate for Leases? You're Not Alone!" Weaver Blog
- "Federal ESSER Funding Creates Opportunities and Challenges for School Districts," Weaver Blog
- "February's Deep Freeze Taught Texas School Districts Some Unexpected Lessons," Weaver Blog
- "Educators Take Note: Expenses for COVID-19 Protective Items May Be Tax Deductible," Weaver Blog
- "Fund Your Future: Understanding and Protecting Fund Balances," Weaver Blog
- "New Title IX Harassment Rules Took Effect in August," Weaver Blog
- "Nonprofit Accounting & Audit," Weaver CPE
- "The Audit: Lessons Learned and Common Pitfalls," North Central Texas Council of Governments
- "Jumping on the Analytics Bandwagon," Weaver CPE



Bruce Mills, CIA, CFE | Subject Matter Resource: Education-Related Retirement Systems

Managing Director, Asset Management Consulting

Bruce has more than 30 years of experience building and developing teams for internal audit, compliance and operational risk within the asset management sector. Bruce has broad global asset management knowledge and an understanding of regulatory and compliance requirements globally.

He built internal audit plans and risk assessments for Invesco Ltd., a \$1.3 T asset manager for 15+ years and has led internal audits, compliance reviews and risk assessments for pensions, public and private funds, ETFs, registered investment advisers, third-party risk management and ESG programs. He has built both Internal Audit and Compliance risk assessments, internal audit, and compliance monitoring plans for multiple clients since moving to his consulting practice

Bruce has also presented audit and compliance plans, issues and corrective actions to boards and senior management, conducted fraud/regulatory investigations, led process mapping and innovation projects, and conducted AML/BSA reviews.

Representative Clients:

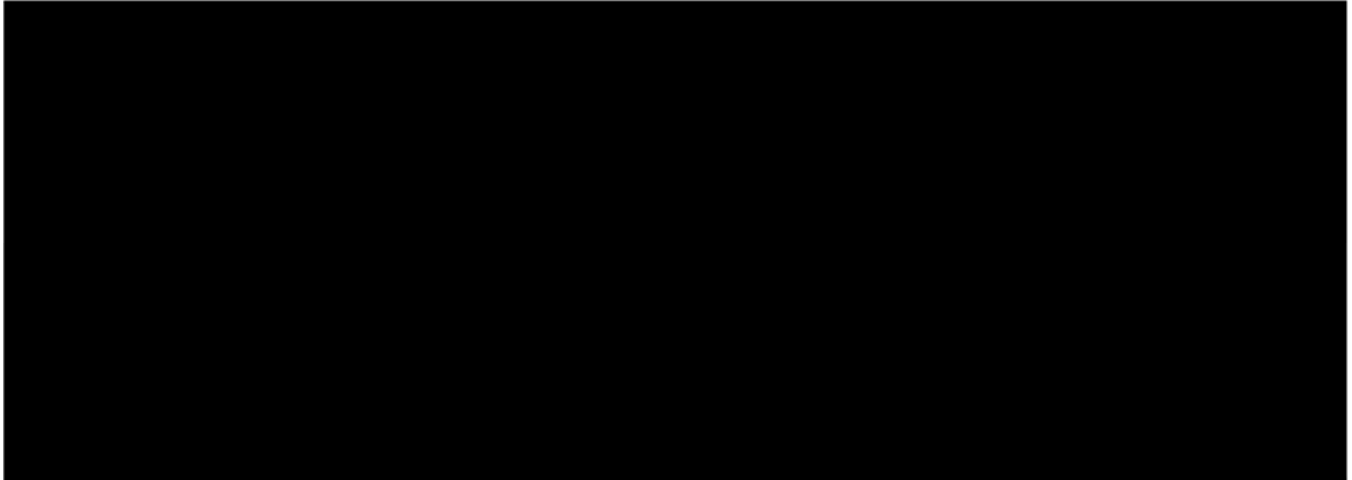


Professional Involvement, Additional Certifications and Education

- Certified Internal Auditor (CIA) and Certified Fraud Examiner (CFE)
- Bachelor of Arts, history, University of Texas at Austin

Our Approach to Services

- a. Assess current outcomes and trends affecting education; develop new strategies, delivery systems and organizational approaches
- b. Improve coordination and communication across departments and agencies
- c. Redesign or improve processes and their supporting organization, including technology improvements
- d. Support delivery of educational priorities



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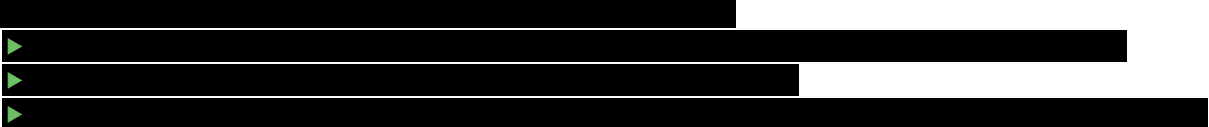
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6. Reimagining Tax and Finance

N/A – Weaver is not proposing on this service.

7. Effectively Establishing and Managing Pensions and Benefits Programs

N/A – Weaver is not proposing on this service.



8. Building Resilience and Crisis Response

The best crisis response is a crisis lessened, or even entirely prevented, thanks to resilience measures already in place. Resilience-building activities have a rate of return of anywhere from \$1 to \$4 per dollar spent. We're eager to partner with your entities to help assess their vulnerabilities and capacity, and develop locally grown plans for resilience in the face of crises their community faces. Whatever the future, we're here to help manage it by developing the right resources to mitigate damage, recover, and building resilient communities.

Our Weaver team excels in this arena, ready whenever you call on us to provide this set of strategic professional consulting services. Decades of experience supporting state and local governments and regional agencies with disaster preparation and crisis response enables us to show you how to assess each organization's climate, weather and other risks, analyze the economic impacts specific to each agency, and develop robust plans to address recovery and to mitigate both financial and human losses.

When a crisis or natural disaster does strike, Weaver also has the skills and experience to support in managing the grant management process from planning to close out with a focus on grant compliance throughout the process.

Weaver Leads



Brandon Tanous, CIA, CFE, CGAP, CRMA | Scope Co-Lead
Partner, Risk Advisory Services

Brandon has over 15 years of internal audit and advisory experience, including extensive work for government entities providing performance assessments, grant and contract monitoring, internal audit, fraud detection, business process improvement, internal control evaluation and risk management. He also has experience conducting quality assessment reviews for state agencies.

Representative Clients: [REDACTED]

Brandon's full resume is available in Tab 4 – Vendor Profile



Alyssa G. Martin, CPA | Scope Co-Lead
National Strategy Leader: Large Market and Public Entities

With more than 25 years of experience in public accounting, Alyssa leverages her rich experience to assist organizations in managing risk, establishing governance and strategy, preventing fraud, ensuring compliance and improving operations. She has many years of experience working directly with school districts, municipalities, regional entities, state agencies and other complex government clients, and understands the unique needs of these environments.

Representative Client Experience: [REDACTED]

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Alyssa's full resume is available in Tab 4 – Vendor Profile

Partnering for Success

N/A – Weaver is not engaging a subcontractor for this scope of work.

Our Experience



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Our Team



Adam Jones | Subject Matter Resource: Organizational Risk Management
Senior Advisor, Risk Advisory Services

Following a long and distinguished career in state government, Adam has approximately ten years of experience as a management consultant. He brings both broad and deep experience in strategic governance, human resources, policy development and implementation and effective operations management. A highly effective facilitator, he serves as an invaluable resource for identifying organizational risks and working with management to facilitate meaningful, sustainable change.

Representative Client Experience: [Redacted]

Adam's full resume is available in Tab 4 – Vendor Profile



Todd Hoffman | Subject Matter Resource: Crisis Management and Response
Partner, Government Consulting Services

Todd has 34 years of consulting experience successfully delivering results for local and state government entities. He has led large-scale projects in business process improvement, financial and organizational assessments, grants management technology implementations, workforce development, stakeholder outreach and inclusion, employee engagement and change management and communications.

Representative Client Experience: [Redacted]

Todd's full resume is available in Tab 4 – Vendor Profile



Rick Astray-Canada III, Ph.D. | Senior Manager, Government Consulting Services

Rick holds a Ph.D. in Public Affairs, with a focus on public policies to build resilience to natural hazards. His approach is to work with stakeholders to quantify risk, identify vulnerabilities, and also identify existing capacity to reduce risk of a disaster or crises. With 12 years of experience leading government strategy teams partnering with state and local governments, Rick has created operating models, functional designs and policies for more equitable and resilient human services programs.

Rick has also managed global projects with stakeholders across ten countries while starting a major global consulting firm's global crisis management service. He led *pro bono* consulting projects for two and half years for the United Nations Office for Disaster Risk Reduction (UNDRR) global partnership with the private sector for disaster resilient societies.

He has led teams on more than a dozen medium and large state and local government projects requiring change management and project management. Rick is a skilled Human Centered Designer who routinely facilitates designs of operating models and programs, with an emphasis on equity, with stakeholders numbering from 15 to 150.

Rick is deeply experienced in stakeholder engagement. In his roles since 2009, he has worked with clients to identify and engage stakeholders in meaningful ways that lead to equitable change. His approach is to help all stakeholders understand the reasons they come to the table and to align around mutually beneficial activities.

Professional Involvement, Additional Certifications and Education

- Doctorate of Philosophy, public affairs, Master of Public Affairs, and Bachelor of Arts, political science, Florida International University



Jennifer Garrett | Senior Associate, Government Consulting Services

With more than three years of experience in developing and implementing CDBG and CDBG-DR funded housing programs that promote community flood resiliency, Jenn brings detailed knowledge of grant compliance and administration. Jenn is skilled in project management, partnership development, and problem solving, and is proficient in handling diverse functions with a passion for working with communities to reach sustainable solutions.

As the former Program Manager for one of Harris County Community Services Department's affordable housing programs, she was responsible for overseeing the pre-development, pre-construction, and construction of five single-family housing developments and the acquisition of 26 single-family units, resulting in a planned total of over 200 new and affordable homes to benefit program-qualified families. She was integral to ensuring the program's mixed-income developments were designed and constructed utilizing green infrastructure practices to promote equity and sustainability for the community.

Moreover, she spearheaded the development and implementation of the applicant process for this \$82M+ CDBG-DR and CDBG funded program. Jenn worked directly with the Texas General Land Office to further promote effective and compliant expenditure of the program's grant funds as defined by federal, state and local requirements.

Professional Involvement, Additional Certifications and Education

- Master of Science, Social Work, administration and policy practice, University of Texas at Austin
- Bachelor of Social Work, poverty studies and social justice, Baylor University

Our Approach to Services

- a. Develop risk assessment tools, including economic impact measures, to help agencies understand and quantify risks such as climate change impacts, weather hazards, and other hazards. Identify cost-effective mitigation measures.
- b. Identify and engage stakeholders to conduct organization assessments to identify vulnerabilities and capacity to reduce risk.
- c. Design resilience-building strategies that heed your community's vulnerabilities and leverage its strengths (capacity), while working to reduce risk using community-focused approaches.
- d. Support the agency in crisis to continue fulfilling its mission, reduce impacts and improve future responses
- e. Support implementation of action plans and best practices

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Our Approach to Resilience Building

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9. Transforming Back-Office Functions

Robust, efficient operational and financial processes are the backbone of all successful organizations, including ESCs, school districts and other government and public-facing agencies.

Your operational functions should produce insight and drive actions that will impact your operations and financial strength. At times, you may need specific knowledge and resources to optimize processes or make the leap into new structures or functions.

Weaver's financial and operational professionals provide strategic guidance and special project assistance to assist you in transforming your operations and achieving your strategic mission.

Weaver Lead



Alyssa G. Martin, CPA | Scope Lead

National Strategy Leader: Large Market and Public Entities

With more than 25 years of experience in public accounting, Alyssa is widely recognized for her work collaborating with management teams on growth strategies and governance matters. Alyssa has deep knowledge and experience in internal audit, risk management, operational analysis, quality assurance reviews, fraud prevention, IT audit, business management consulting, strategic planning and technology consulting.

Representative Client Experience:

[Redacted client experience text]

Partnering for Success

Weaver will be partnering with Mass Ingenuity for this engagement. For an overview of Mass Ingenuity, please see *Tab 5 – Our Products and Services, Our Services, Partnering for Success*.



Our Experience



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Our Team



Todd Hoffman | Subject Matter Resource: Business Process Transformation
Partner, Government Consulting Services

Todd has 34 years of consulting experience successfully delivering results for local and state government entities. He has led large-scale projects in business process improvement, financial and organizational assessments, grants management technology implementations, workforce development, stakeholder outreach and inclusion, employee engagement and change management and communications.

Representative Client Experience: [Redacted]

Todd's full resume is available in Tab 4 – Vendor Profile



Brandon Tanous, CIA, CFE, CGAP, CRMA | Subject Matter Resource: Financial Assessments and Compliance
Partner, Risk Advisory Services

Brandon has over 15 years of internal audit and advisory experience, including extensive work for government entities providing performance assessments, grant and contract monitoring, internal audit, fraud detection, business process improvement, internal control evaluation and risk management. He also has experience conducting quality assessment reviews for state agencies.

Representative Clients: [Redacted]

Brandon's full resume is available in Tab 4 – Vendor Profile



Dan Graves, CPA | Subject Matter Resource: Risk Management and Compliance

Partner, Risk Advisory Services

Dan has more than 17 years of experience in public accounting. Maintaining a primary focus on higher education and state government entities, Dan also leads Weaver's Central Texas Risk Advisory Services professionals. He has extensive experience with financial operations and reporting requirements.

Representative Clients: [REDACTED]

Dan's full resume is available in Tab 4 – Vendor Profile



Reema Parappilly, CISA, CDPSE | Subject Matter Resource: IT Assessments and Compliance

Partner, IT Advisory Services

Reema has more than 17 years of experience in providing IT advisory services. Her focus includes IT internal audits, Sarbanes-Oxley Compliance, external audit support, and continuous controls monitoring. She has experience in performing IT risk assessments and executing IT internal audit plans, including strategic electronic asset management, database administration, data loss prevention, remote technology (post-COVID assessment), and system implementations. She also leads compliance engagements, including annual documentation of controls design and testing. Through all of her engagements, she works to help clients balance compliance with organizational resource restrictions, and to educate process owners so they can make better internal control decisions. Her focus on both IT internal audits and external audit support allows her to see multiple facets of government entities and provide thoughtful considerations to management.

Representative Clients: [REDACTED]

Professional Involvement, Additional Certifications and Education

- Member, ISACA, IIA, Insurance Accounting and Systems Association (IASA), Cloud Security Alliance
- Certified Information Systems Auditor
- Master of Science, information systems technology, George Washington University
- Bachelor of Business Administration, finance and information systems, George Washington University

Representative Presentations and Publications

- Diversity in Security Luncheon Speaker, Cloud Security Alliance's 2022 Annual SECTember Conference
- Don't Have Your Head in the Clouds on Cloud, APPFA (Association of Public Pension Fund Auditors) 2022 Fall Conference
- "Application Implementations: How IA Can Save the Day," Texas State Auditor's Office
- "Cyber Attacks: How Prepared Are You?" TXCPA School District Conference
- "How to Reduce Terminated User Exceptions in Your Next Audit," Weaver Blog
- "How to Monitor Your Internal Controls If Your Company Is No Longer Subject to SOX 404(b)," Weaver Blog
- "Weaver Entrepreneur Mindset," ALPFA Regional Symposium
- "Application Implementations: The Good, the Bad and the Ugly," Weaver CPE
- "Incorporating data analytics into external auditing and internal monitoring," TXCPA School District Conference
- "Jumping on the Analytics Bandwagon," ISACA "She Leads Tech" Conference
- "How Paranoid Should You Be? Understanding IT Risks," IIA
- "Cloud in the Forecast," ISACA Houston Governance Risk & Compliance



Aaron Howard | Mass Ingenuity

Chief Executive Officer and Chief Technology Officer

Aaron brings 15 years in state government consulting and 30 years as a technology executive. As Chief Executive Officer and Chief Technology Officer, Aaron's vision for Mass Ingenuity's enterprise performance management methodology began in 2007 leading to the company's Results Management System™ and Results Software, a cloud-based application for key performance indicators.

Aaron's software vision has been implemented at dozens of government entities, resulting in significant data maturity, operational, strategic and cultural advancements.

Representative Clients: [REDACTED]

Education

- Master of Science, electrical engineering/computer science, and Bachelor of Science, electrical engineering/computer science, University of Washington
- Wharton School for Executive Business Studies, Stanford University Graduate School of Business, and Berklee College of Music
- Executive Prosci Certification, 2010



Jim Clark | Mass Ingenuity

Vice President of Professional Services and Senior Consultant

Jim has 12 years with Mass Ingenuity leading its professional services consulting team. Jim is recognized for his diverse skills, including executive and management team facilitation, sponsor and change management, organization development, process improvement, and diversity, equity, and inclusion cultural transformation. Jim has facilitated dozens of 7-Step Lean Process Improvement projects for government clients with consistent results that exceeded clients' expectations.

Jim's focus includes the development and improvement of client's key performance indicators and the custom design of their tailored Results Software application.

Representative Clients: [Redacted]

Education

- Masters of Business Administration, economics and finance, Southern Illinois University, Carbondale
- Bachelor of Business Administration, marketing and finance, Middle Tennessee State University
- Prosci Change Management Certification, 2014

Paul Aljets | Mass Ingenuity

Data Analyst

Paul has worked with the Mass Ingenuity team for 10 years as a researcher and data analyst, including providing internal research for Mass Ingenuity on market and product analysis.

Paul has worked on projects for numerous local and state government agencies. Paul gravitates to a well-rounded and practical approach to research using both quantitative and qualitative methods to solve client problems. He has experience in everything from surveys to agent-based modeling. Paul helped develop the user experience for Results Software and provides clients with their data dashboards and visual analytics.

Representative Clients: [Redacted]

Education

- Master's degree in Public Policy and Bachelor's degree in Political Science, Oregon State University

Our Approach to Services

- a. Diagnose and assist with the transformation of key back-office functions
- b. Support back-office strategy, lean management and business process redesign, including shared services and digitization
- c. Identify and apply best practices from both private and public sectors to help optimize procurement, improve staff capabilities and optimize technology and other assets
- d. Develop IT strategies to help agencies achieve their mission, such as optimizing core IT functions and identifying opportunities for technology upgrades or updates
- e. Help improve IT portfolio management and capital planning
- f. Support implementation of improvement strategies

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10. Driving Operational Transformations

Growing an organization requires deliberate planning and bold action. At some point, every organization must ask itself, “*What is the gap between **the organization we are** and the organization we aspire to be?*”

Driving operational transformations is at the heart of Weaver’s most successful client engagements, both in the public and the private sectors.

We help our clients become the best organization they can be by not just assessing their areas of concern and handing them a report, but by providing collaborative recommendations that are insightful, practical, scalable, sustainable, and can be implemented with measurable performance results.

Our professionals understand the nuanced interrelations among administrative and operational units and their overlapping processes, and we remain cognizant of the implications that every change can have for the organization as a whole.

This sense of perspective means that we’ll always work to develop actionable, relevant recommendations that suit today’s needs as well as tomorrow’s goals.

Together, we provide a comprehensive, tailored assessments , not “for” our clients, but **with** our clients.



Weaver Lead



Brandon Tanous, CIA, CFE, CGAP, CRMA | Scope Lead

Partner, Risk Advisory Services

Brandon has over 15 years of internal audit and advisory experience, including extensive work for government entities providing performance assessments, grant and contract monitoring, internal audit, fraud detection, business process improvement, internal control evaluation and risk management. He also has experience conducting quality assessment reviews for state agencies.

Representative Clients: [REDACTED]

Partnering for Success

For this scope, Weaver will be partnering with Mass Ingenuity. For an overview of Mass Ingenuity, , please see *Tab 5 – Our Products and Services, Our Services, Partnering for Success*.

Our Experience



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Our Team



Adam Jones | Subject Matter Resource: Strategic Management

Senior Advisor, Risk Advisory Services

Following a long and distinguished career in state government, Adam has approximately ten years of experience as a management consultant. He brings both broad and deep experience in strategic governance, human resources, policy development and implementation and effective operations management.

Representative Clients: [REDACTED]

Adam's full resume is available in Tab 4 – Vendor Profile



Todd Hoffman | Subject Matter Resource: Crisis Management and Response

Partner, Government Consulting Services

Todd has 34 years of consulting experience successfully delivering results for local and state government entities. He has led large-scale projects in business process improvement, financial and organizational assessments, grants management technology implementations, workforce development, stakeholder outreach and inclusion, employee engagement and change management and communications.

Representative Client Experience: [REDACTED]



Alyssa G. Martin, CPA | Subject Matter Resource: Operational Risks

National Strategy Leader: Large Market and Public Entities

With more than 25 years of experience, Alyssa is widely recognized for her work collaborating with management teams on growth strategies and governance matters. She has focused throughout her career on enterprise risk management, internal audit, fraud prevention, IT audit, operational analysis, business management consulting, strategic planning and technology consulting for state and local government entities.

Representative Clients: [REDACTED]

Alyssa's full resume is available in Tab 4 – Vendor Profile



Holly Hart, CPA, CIA | Manager, Risk Advisory Services

Holly has over 10 years of experience providing objective performance and internal audit services involving federal programs and compliance with regulations, effectiveness and efficiency of key municipal government operations, performance oversight and governance practices, and financial/ operational risk analysis internally and for not-for-profit business partners. Holly is also experience in driving process improvement efforts to enhance internal audit procedures, mentor new auditors, and develop training opportunities that strengthen auditor skills and impact for the benefit of the communities our clients serve.

Holly formerly served as an Assistant City Auditor for City of Dallas' Office of the City Auditor, as well as an Auditor for the U.S. Department of the Interior. She currently serves as Adjunct Instructor for Dallas College's Career and Technical Education/CPA program at the Mountain View Campus, with courses including Government & Not-For-Profit Accounting and Audit Theory.

Representative Clients: [Redacted]

Professional Involvement, Education and Certifications

- Member, IIA and Intergovernmental Audit Forums (Southeastern/Western)
- Association of Government Accountants (AGA)
 - Former Board Member of the Dallas Chapter (2016 – 2019)
- Association of Local Government Auditors (ALGA)
 - Current Member, Professional Issues Committee and Peer Review
- CPA and Certified Internal Auditor (CIA)
- Bachelor and Master of Science in Accounting and Information Management, University of Texas at Dallas



Aaron Howard | Mass Ingenuity
Chief Executive Officer and Chief Technology Officer

Aaron brings 15 years in state government consulting and 30 years as a technology executive. As Chief Executive Officer and Chief Technology Officer, Aaron's vision for Mass Ingenuity's enterprise performance management methodology began in 2007 leading to the company's Results Management System™ and Results Software, a cloud-based application for key performance indicators.

Aaron's software vision has been implemented at dozens of government entities, resulting in significant data maturity, operational, strategic and cultural advancements.

Representative Clients: [Redacted]

Education

- Master of Science, electrical engineering/computer science, and Bachelor of Science, electrical engineering/computer science, University of Washington
- Wharton School for Executive Business Studies, Stanford University Graduate School of Business, and Berklee College of Music
- Executive Prosci Certification, 2010



Jim Clark | Mass Ingenuity

Vice President of Professional Services and Senior Consultant

Jim has 12 years with Mass Ingenuity leading its professional services consulting team. Jim is recognized for his diverse skills, including executive and management team facilitation, sponsor and change management, organization development, process improvement, and diversity, equity, and inclusion cultural transformation. Jim has facilitated dozens of 7-Step Lean Process Improvement projects for government clients with consistent results that exceeded clients' expectations.

Jim's focus includes the development and improvement of client's key performance indicators and the custom design of their tailored Results Software application.

Representative Clients:

[Redacted client names]

Education

- Masters of Business Administration, economics and finance, Southern Illinois University, Carbondale
- Bachelor of Business Administration, marketing and finance, Middle Tennessee State University
- Prosci Change Management Certification, 2014

Paul Aljets | Mass Ingenuity

Data Analyst

Paul has worked with the Mass Ingenuity team for 10 years as a researcher and data analyst, including providing internal research for Mass Ingenuity on market and product analysis.

Paul has worked on projects for numerous local and state government agencies. Paul gravitates to a well-rounded and practical approach to research using both quantitative and qualitative methods to solve client problems. He has experience in everything from surveys to agent-based modeling. Paul helped develop the user experience for Results Software and provides clients with their data dashboards and visual analytics.

Representative Clients:

[Redacted client names]

Education

- Master's degree in Public Policy and Bachelor's degree in Political Science, Oregon State University

Our Approach to Services

- a. Provide an independent perspective on current/trending performance through tailored diagnostics and flexible solutions
- b. Support the design and planning of implementation of new programs
- c. Assist with building capacity at all levels and across all functions, including the design of performance management tools
- d. Support implementation of operational strategies, process transformations or new program deployments

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11. Creating a Better Citizen Experience, Including Digitization

Every day, citizens have “experiences” with a multitude of providers – we know that they expect, and deserve, their experiences with government to match the quality of private sector providers.

The citizen experience should be Human Centered, data driven, and a seamless way to connect with government. Weaver is here to help each participating agency partner with its citizens to design the experience they desire while dramatically improving efficiency and effectiveness.

Weaver is a thought leaders in the areas of organizational growth, innovation and transformation; scan the QR code to view our ongoing blog series, **Your Guide to a Successful Digital Transformation.**



Weaver Lead



Todd Hoffman | Scope Lead
Partner, Government Consulting Services

Todd has 34 years of consulting experience successfully delivering results for local and state government entities. He has led large-scale projects in business process improvement, financial and organizational assessments, grants management technology implementations, workforce development, stakeholder outreach and inclusion, employee engagement and change management and communications.

Representative Client Experience: [REDACTED]

Partnering for Success

Weaver will be partnering with Mass Ingenuity for this engagement. For an overview of Mass Ingenuity, please see *Tab 5 – Our Products and Services, Our Services, Partnering for Success.*

Our Experience



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Our Team



Morgan Page, CIA | Subject Matter Resource: Digital Transformation
Partner-in-Charge, Digital Transformation and Automation Services

Morgan leads the Digital Transformation and Automation service at Weaver. With 13 years of business experience, he regularly works with organizations at all stages of their digital transformation journey defining and delivering results that are sustainable, scalable and aligned with the needs of the organization. With a wide breadth of experience across many different applications and methodologies, he has successfully helped organizations identify and implement the solution best for their operations, whether have billion-dollar annual revenues or are just starting up.

Representative Clients: [REDACTED]

[REDACTED]

Morgan's full resume is available in Tab 4 – Vendor Profile



Alyssa G. Martin, CPA | Subject Matter Resource: Strategy and Optimization
National Strategy Leader: Large Market and Public Entities

With more than 25 years of experience in public accounting, Alyssa is widely recognized for her work collaborating with management teams on growth strategies and governance matters. Alyssa has deep knowledge and experience in internal audit, risk management, operational analysis, quality assurance reviews, fraud prevention, IT audit, business management consulting, strategic planning and technology consulting.

Representative Client Experience: [REDACTED]

[REDACTED]

Alyssa's full resume is available in Tab 4 – Vendor Profile

Our Approach to Services

- a. Define and assess “citizen journeys”
- b. Design a citizen-centric process transformation
- c. Build an overall service transformation plan
- d. Support implementation of citizen experience and digitization strategies across departments or agencies

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12. Addressing Capital Productivity and Capital Management

As an accountancy firm, bean counting is our fun. Not only do we provide audit services to confirm capital productivity and capital management, we have specific, proven experience in the education space – including K-12 and higher education – and for municipal and state governments and others throughout the sector.

Weaver also provides professional services to over 100 contracting companies, from residential builders to heavy road construction. In addition, we have provided construction monitoring and auditing for numerous governmental and education clients.

Our in-house Construction Industry Services practice includes Certified Construction Industry Financial Professionals® (CCIFP) on staff — a designation few CPA firms are able to offer in their qualifications.

This, combined with our industry participation and years of service to construction clients means we understand the management processes over all phases of construction — from the initial bid phase to the contract terms and conditions, to the job cost reports supporting expenditures incurred on the project, to the computation of revenues earned.

Our construction experience involves projects with construction costs of up to \$700 million and both local, Texas-based construction companies, as well as multi-state national contractors with revenues ranging from under \$10 million to those with more than \$1 billion in annual revenues.

Our audits have focused on the financial data, as well as construction management/process audits that encompass not only contracted versus invoiced costs but also examine the client's construction management processes.



Active Participation in Industry Organizations

Weaver actively participates in the following construction organizations:

- Construction Financial Management Association (CFMA)
- Associated General Contractors (AGC)
- Associated Builders and Contractors (ABC)

By keeping pace with changes in the industry, Weaver has the knowledge and insight needed to identify potential cost-saving items.



Weaver Lead



Daniel Graves, CPA | Scope Lead
Partner, Risk Advisory Services

Dan has more than 17 years of experience in public accounting, internal control process and IT risk management. He currently leads Weaver's Internal Audit Methodology development. His areas of emphasis include construction audits, contract and grant compliance, higher education, government, risk assessments, internal control consulting, business process improvement and fraud prevention. Maintaining a primary focus on education and government entities, Dan also leads Weaver's Central Texas Risk Advisory Services professionals.

Representative Clients: [Redacted]

Dan's full resume is available in Tab 4 – Vendor Profile



Partnering for Success

Weaver will be partnering with Foresite Group for this engagement. For an overview of each of these companies please see *Tab 5 – Our Products and Services, Our Services, Partnering for Success.*

Our Experience



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Our Team



Alyssa G. Martin, CPA | Subject Matter Resource: Construction Cost Evaluation

National Strategy Leader: Large Market and Public Entities

With more than 25 years of experience in public accounting, Alyssa is widely recognized for her work collaborating with management teams on growth strategies and governance matters. Alyssa has deep knowledge and experience in internal audit, risk management, operational analysis, quality assurance reviews, fraud prevention, IT audit, business management consulting, strategic planning and technology consulting.

Representative Client Experience: [Redacted]

Alyssa's full resume is available in Tab 4 – Vendor Profile



Jason Berkenpas, CPA, CCIFP | Director, Construction Industry Services

With more than 15 years of public accounting experience, Jason leads financial audits and reviews primarily for clients in the construction industry, ranging from specialty subcontractors to large general and industrial contractors. He has managed audits for construction contractors with annual revenues in excess of \$1 billion.

Representative Clients: [Redacted]

Professional Involvement, Additional Certifications and Education

- Member, AICPA, TXCPA, and Construction Financial Management Association (CFMA)
- Board of Directors, CFMA Houston Chapter
- Certified Construction Industry Financial Professional (CCIFP)
- Bachelor of Science, accounting, University of Houston – Clear Lake



David A. Butler, CPA, CISA | Manager, Risk Advisory Services

David has more than 10 years of experience in accounting and advisory roles. Through his experience, he has managed internal audit engagements, internal control testing and process improvement that was related to 200 and more internal controls. He also managed large, multi-phase CMAR construction projects for state institutions, as well as risk assessment engagements that focused primarily on accounting and finance operations

Representative Clients: [Redacted]

Professional Involvement, Additional Certifications and Education

- Member, AICPA, IIA (Dallas Chapter) and Information Systems Audit and Control Association (ISACA), North Texas chapter
- Certified Information Systems Auditor (CISA)
- Master of Science, finance, and Bachelor of Business Administration, accounting, Texas A&M University



Destiny Jasso | Senior Associate, Risk Advisory Services

Destiny has over five years of industry experience, with a focus on internal audit, assurance, SOX compliance and consulting engagements for entities such as financial institutions and school districts. She has performed assurance and consulting engagements in accordance with internal audit standards, including the International Professional Practices Framework (IPPF) and COSO ERM Framework. In addition, she leads engagement teams and maintains communication with clients and management on a regular basis.

Representative Clients:



Professional Involvement, Additional Certifications and Education

- Member, IIA, Dallas Chapter
- Master of Science, Accounting, University of Texas at Dallas
- Internal Auditing Education Partnership certification from the University of Texas at Dallas
- Bachelor of Business Administration, Accounting, Sam Houston State University



Lee Comer | Foresite Group

Broadband Engineering Practice Leader

Lee brings over 20 years of experience as a designer, supervisor, and project manager in the telecommunications industry. A native Alabamian, Lee earned his Bachelors and Masters of Industrial Design from Auburn University. Starting as a services technician, Lee progressed through various roles of responsibility and leadership including OSP Network Designer, Special Services Network Manager, Construction Supervisor, Senior Project Manager (PLS/U-verse), and Senior OSP Design Manager over Google Fiber Project responsible for Austin, Texas. Lee translates his knowledge of design, construction, and installation of communication networks into a comprehensive program.

Professional Involvement, Additional Certifications and Education

- Master of Industrial Design, Auburn University
- Bachelor of Industrial Design, Auburn University



Thuy Le Ho | Foresite Group
Design Program Manager

Thuy is a Broadband Engineering Program Manager with Foresite Group. She brings over 16 years of experience in Broadband Network Design and Management. Thuy worked as a Network Designer for four years, providing field and design services to AT&T. Services included routine maintenance of outside plant, service orders, fiber and copper design to new developments and damage work orders. She shifted to management and served as the company liaison to the client, providing weekly reporting and maintaining client satisfaction by consistently meeting the quality and timeliness objectives.

Thuy currently serves as a Program Manager and oversees the Design and Permitting teams across multiple projects. She has managed the City of New Orleans' Institutional Fiber Network project, as well as a fiber densification project for Verizon, where she oversaw design and permitting while working closely with the client to meet timeliness and quality requirement. As the manager on the City of New Orleans project, Thuy has delivered a GIS based high level design for the City's institutional fiber network, technical and strategic assessments, and their business and governance plans.



Arnaldo Blanco | Foresite Group
Chief Engineer

Arnaldo is Chief Engineer for Foresite Group's Broadband Engineering Division. He brings 9 years of professional experience in Telecommunication Engineering & Civil Engineering and is well versed in outside plant design and utility permitting work. Originally from Guaynabo, Puerto Rico, Arnaldo has a Bachelor of Science in Civil Engineering from the Polytechnic University of Puerto Rico and is licensed Professional Engineer with the States of Texas & Washington.

Before joining Foresite Group Arnaldo was a Project Manager working on utility permitting projects for telecom and gas companies with ENCO Consulting. He's also been a Design Manager for Google Fiber's Austin project and an Outside Plant Engineer for multiple projects in his native Puerto Rico.

Professional Involvement, Additional Certifications and Education

- Bachelor of Civil Engineering, Polytechnic University of Puerto Rico
- TX Professional Engineer #126224 and WA Professional Engineer #20106832

Our Approach to Services

- a. Design improved, more transparent and more robust capital planning and allocation process
- b. Evaluate efficiency opportunities to reduce expense and accelerate project completion
- c. Identify opportunities to create value from existing assets
- d. Support implementation of recommended improvements

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13. Delivering Effective Strategies and Plans

From research and data-driven, deep-dive analysis against competitors and environmental factors, our team will dramatically increase each participating agency's likelihood of driving success through effective strategies and plans. We not only position you for success, we deliver a roadmap that gets you there, one step at a time, and in a manner that aligns with the overall goals of this MSA, namely, to ready communities for sustainable futures in as cost-contained a manner as possible.

The best strategic plans are informed by expertise, experience, and co-design with the communities they serve. Weaver will work with you to bring the right stakeholders to the table and create planning processes to build achievable yet audacious strategic plans that map out paths to your desired state in specific, measurable ways.

From rapidly accelerating inflation to severe supply chain shortages and workforce volatility, state and local government are facing challenges and pressures not seen in over 40 years. When coupled with constituent expectations for expanded services, innovative programs, and increased transparency, many government entities are left feeling overwhelmed. Effectively managing the historic investment of Coronavirus relief and recovery funds and driving long-term results requires powerful methods to manage day-to-day operations and the associated grants funding key government programs.

Weaver professionals navigate each client's current and future requirements against this backdrop, taking close consideration any discovered performance gaps within the subject agency.

Weaver Lead



Todd Hoffman | Scope Lead

Partner, Government Consulting Services

Todd has 34 years of consulting experience successfully delivering results for local and state government entities. He has led large-scale projects in business process improvement, financial and organizational assessments, grants management technology implementations, workforce development, stakeholder outreach and inclusion, employee engagement and change management and communications.

Representative Client Experience: [REDACTED]

Partnering for Success

For this scope, Weaver will be partnering with Mass Ingenuity. For an overview of Mass Ingenuity, please see *Tab 5 – Products and Services, 9. Transforming Back-Office Functions*

Our Experience



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Our Team



Alyssa G. Martin, CPA | Subject Matter Resource: Strategic and Operational Planning

National Strategy Leader: Large Market and Public Entities

With more than 25 years of experience, Alyssa is widely recognized for her work collaborating with management teams on growth strategies and governance matters. She has focused throughout her career on enterprise risk management, internal audit, fraud prevention, IT audit, operational analysis, business management consulting, strategic planning and technology consulting for state and local government entities.

Representative Clients:

[Redacted client names]

Alyssa's full resume is available in Tab 4 – Vendor Profile

Our Approach to Services

- a. Assess the effectiveness of existing strategic and operations plans and procedures, assist with prioritizing key measures, and recommend how to better achieve the mission
- b. Develop models to analyze strategic alternatives, including validating or stress-testing alternative approaches
- c. Assist with building capacity at all levels and across all functions, including the design of performance management tools
- d. Support implementation of operational strategies, process transformations or new program deployments

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Stakeholder Engagement

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14. Applying Advanced Analytics

Advanced data analytics tools and robotic process automation (RPA) offer new possibilities to public organizations, just as they have for big private companies. These tools allow Region 14 ESC and other NCPA participants to leverage their existing data to improve effectiveness, efficiency and constituent/user satisfaction.

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Key Elements of Weaver's Approach



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Weaver Lead



Morgan Page, CIA | Scope Lead

Partner-in-Charge, Digital Transformation and Automation Services

Morgan leads the Digital Transformation and Automation service at Weaver. With 13 years of business experience, he regularly works with organizations at all stages of their digital transformation journey defining and delivering results that are sustainable, scalable and aligned with the needs of the organization. With a wide breath of experience across many different applications and methodologies, he has successfully helped organizations identify and implement the solution best for their operations, whether have billion-dollar annual revenues or are just starting up.

Representative Clients:

[Redacted]

Morgan's full resume is available in Tab 4 – Vendor Profile



Partnering for Success

Weaver will be partnering with Mass Ingenuity for this engagement. For an overview of Mass Ingenuity, please see *Tab 5 – Our Products and Services, Our Services, Partnering for Success*.

Our Experience



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Our Team



Alyssa G. Martin, CPA | Subject Matter Resource: Operational Assessment
National Strategy Leader: Large Market and Public Entities

With more than 25 years of experience in public accounting, Alyssa is widely recognized for her work collaborating with management teams on growth strategies and governance matters. Alyssa has deep knowledge and experience in internal audit, risk management, operational analysis, quality assurance reviews, fraud prevention, IT audit, business management consulting, strategic planning and technology consulting.

Representative Client Experience:

[Redacted client experience text]

Alyssa's full resume is available in Tab 4 – Vendor Profile



Prasad Gaitonde | Business Intelligence Manager

Prasad has over eight years of experience working with various platforms such as BI platforms & SQL server 2008, 2008 R2 and 2012. He has experience in the analysis, design, implementation and administration of business intelligence solutions with Microsoft SQL server 2008/2005/2012 in development, testing and production environments. He has a deep knowledge and working experience in Bill Inmon Methodology and Ralph Kimball Methodology, Logical Modeling, Physical Modeling, Dimensional Data Modeling, Star Schema, Snowflake Schema, FACT tables and Dimension tables.

Prasad has extensive experience in mortgage and lending, financial, manufacturing and health care industries. He has proven leadership skills in team environments and project management (SCRUM) skills that will keep this engagement on track and on budget.

Education, Additional Certifications and Professional Involvement

- Master of Science (MS, Honors) Engineering from Florida Institute of Technology, Melbourne, FL
- Bachelor's in ECE Engineering, Shivaji University, India
- Certification in Designing Business Intelligence Solutions with Microsoft SQL Server 2012 (Exam 70-467)



Tracy Schultz | Manager, Digital Transformation and Automation Services

Tracy has more than 13 years of technical experience, with emphasis on identifying efficiency and automation opportunities for various business processes. He documents organizational procedures, identifies pinch points, works with application programming interfaces (APIs) to facilitate communication between systems, and builds Robotic Process Automation (RPA) systems and processes from the ground up. He is also able to analyze and query various databases and convert disparate data to and from various systems.

Tracy utilizes several RPA tools and programs in numerous languages, and has experience with multiple accounting and computer systems used by large organizations and agencies. He earned a Bachelor of Arts in Business Management with an emphasis in Information Technology from Angelo State University, and an Associate of Arts in Information Technology from Western Oklahoma State College.

Technical Skills and Aptitudes

- Active Directory Management
- Experience with the following accounting and computer systems:
 - JD Edwards
 - BaaN
 - Windows Desktop and Servers
 - Linux/Unix Desktops and Servers
 - MySQL
 - DB2
 - MSSql
 - Oracle
- Programming experience with the following languages
 - Python
 - SQL
 - PowerShell
 - HTML/CSS
 - Groovy/Grails
 - C#
- Experience with the following Robotic Process Automation (RPA) tools
 - BluePrism
 - UiPath
 - PowerAutomate

Our Approach to Services

- a. Shape a long-term analytics strategy
- b. Develop policies and processes to protect personally identifiable information, including data architecture and processes to store and access data
- c. Identify and deliver use cases to help identify how to improve outcomes, then create pilot programs
- d. Turn models and tools into robust, scalable instruments that build the capabilities of front-line employees and managers
- e. Support implementation of advanced analytics, models and use cases

Using Advanced Analytics Effectively

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Results

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15. Transforming Organizations, Workforce, and Culture

As fewer resources require governments to do more with less, Weaver's professionals enable governments, education services and others that must operate differently – and leaner – to be smarter in their approach to human capital.

Weaver assists our public sector clients in optimizing their human capital structure and ultimately maximizing benefits for their people, both inside the organizations and in the communities they serve.

[REDACTED]
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- ▶ Organizational Assessment and Design
- ▶ Human Capital Strategy
- ▶ Talent Management and DEIB Fulfillment
- ▶ Change Management Communications
- ▶ HR Analytics
- ▶ Learning And Development

Weaver Lead



Adam Jones | Scope Lead
Senior Advisor, Risk Advisory Services

Following a long and distinguished career in state government, Adam is particularly regarded for his experience and insight with regard to managing organizational change and maximizing organizational performance. He understands human resources, contracting and procurement, organization development, finance, accounting, information technology, grants management, external relations, rule-making and risk assessment. As needed, he serves as an invaluable resources for facilitating ongoing, sustainable organizational and cultural change.

Representative Clients: [REDACTED]
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Adam's full resume is available in Tab 4 – Vendor Profile

A highly effective facilitator, Adam serves as an invaluable resource for government entities looking to enact meaningful, sustainable change. **He recently co-hosted an episode of Weaver's podcast, *Weaver: Beyond the Numbers – The Business of Government*, with Porter Wilson, Executive Director of the Employees Retirement System of Texas.**



SCAN ME

Partnering for Success

N/A – Weaver is not engaging a subcontractor for this scope of work.

Our Experience



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Our Team



Alyssa G. Martin, CPA | Subject Matter Resource: Operational Risks
National Strategy Leader: Large Market and Public Entities

With more than 25 years of experience in public accounting, is widely recognized for her work collaborating with management teams on growth strategies and governance matters. She has many years of experience working directly with school districts, municipalities, regional entities, state agencies and other complex government clients, and understands the unique needs of these environments.

Representative Clients: [Redacted]

Alyssa's full resume is available in Tab 4 – Vendor Profile



Todd Hoffman | Subject Matter Resource: Organizational Improvement
Partner, Government Consulting Services

Todd has 34 years of consulting experience successfully delivering results for local and state government entities. He has led large-scale projects in business process improvement, financial and organizational assessments, grants management technology implementations, workforce development, stakeholder outreach and inclusion, employee engagement and change management and communications.

Representative Client Experience: [Redacted]

Todd's full resume is available in Tab 4 – Vendor Profile



Marci Sundbeck, CIA, CISA, CCSA, CFE, CRMA | Senior Consultant

Marci has more than 30 years of audit and advisory experience in state government, including 25 years of experience with the Employees Retirement System of Texas, a fiduciary fund of more than \$35 billion in net assets. Having served as both the Director of Enterprise Risk Management and the Director of Internal Audit, Marci has extensive experience developing and managing governance and enterprise risk management programs and processes in government environments.

Representative Clients: [Redacted]

Professional Involvement, Additional Certifications and Education

- Member, Association of Public Pension Fund Auditors (APPFA)
 - Immediate Past President 2007 – 2009
 - President 2005 – 2007
 - Vice President 2002 – 2005
 - Director 2001 – 2002
- Member, Institute of Internal Auditors (IIA)
 - Austin Chapter Board of Governors 2012 – 2015
- Member, Association of Certified Fraud Examiners (ACFE)
 - Austin Area Chapter Director 2004 – Present
- Member, Information Systems Audit and Control Association (ISACA)
- Member, State Agency Internal Audit Forum (SAIAF)
 - Vice Chair 1998 – 2000s
- Certified Internal Auditor (CIA), Certified Information Systems Auditor (CISA), Certification in Control Self-Assessment (CCSA), Certified Fraud Examiner (CFE) and Certification in Risk Management Assurance (CRMA)
- Bachelor of Business Administration, Texas A&M University



Rick Astray-Canada III, Ph.D. | Senior Manager, Government Consulting Services

With 12 years of experience leading government strategy teams partnering with state and local governments, Rick has created operating models, functional designs and policies for more equitable and resilient human services programs. He has led teams on more than a dozen medium and large state and local government projects requiring change management and project management. Rick is a skilled Human Centered Designer who routinely facilitates designs of operating models and programs, with an emphasis on equity, with stakeholders numbering from 15 to 150.

Rick is deeply experienced in stakeholder engagement. In his roles since 2009, he has worked with clients to identify and engage stakeholders in meaningful ways that lead to equitable change. His approach is to help all stakeholders understand the reasons they come to the table and to align around mutually beneficial activities.

Rick is experienced in applying qualitative research methods and human centered design principles to engage diverse groups, including the public, in partnerships.

Rick has also managed global projects with stakeholders across ten countries while starting a major global consulting firm's global crisis management service. He led *pro bono* consulting projects for two and half years for the United Nations Office for Disaster Risk Reduction (UNDRR) global partnership with the private sector for disaster resilient societies.

Professional Involvement, Additional Certifications and Education

- Doctorate of Philosophy, public affairs, Master of Public Affairs, and Bachelor of Arts, political science, Florida International University

Our Approach to Services

- a. Evaluate current state of the organizational structure, governance and management processes
- b. Develop recommendations for improving organizational health and drive change
- c. Provide human capital consulting services
- d. Support implementation of new strategies and transformations

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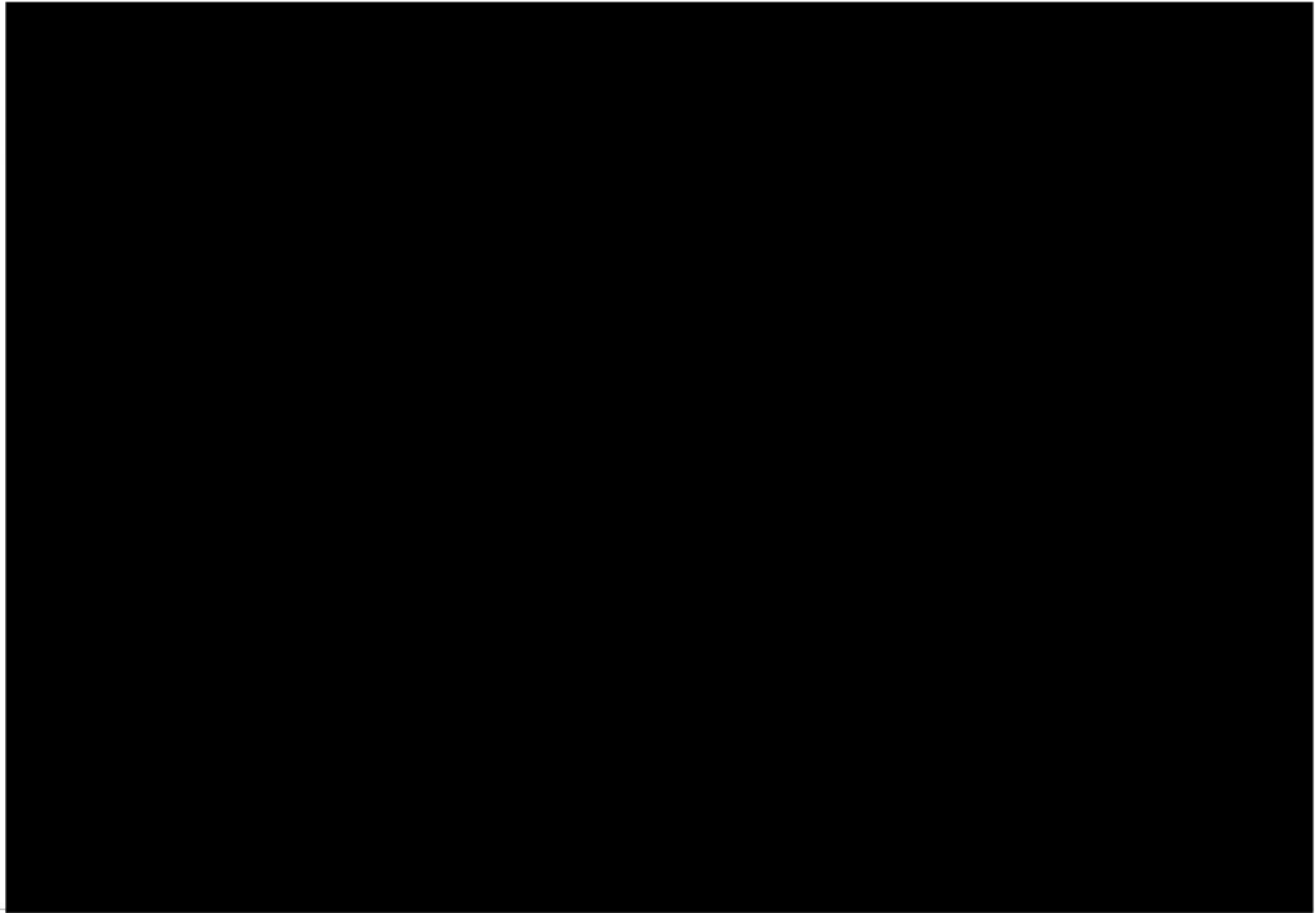
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16. Managing Risk

The essence of an accountancy is, in short, to control risk. We're particularly excited about proposing for this work stream, bringing to Region 14 ESC and NCPA member agencies our robust experience in supporting organizations manage their risk profile while dramatically improving the efficacy of the services they provide their constituents, students and families and beneficiaries.

Weaver Lead



Alyssa G. Martin, CPA | Scope Lead

National Strategy Leader: Large Market and Public Entities

Alyssa leads strategic, multi-disciplinary solutions for Weaver's large clients nationwide. Previously the partner-in-charge of Risk Advisory Services for the firm, Alyssa now leverages her rich experience to assist organizations in managing risk, establishing governance and strategy, preventing fraud, ensuring compliance and improving operations. In addition, she facilitates delivery firm wide to coordinate Weaver's different services for such clients to improve communications and efficiency.

Representative Clients:

[Redacted client names]

Alyssa's full resume is available in Tab 4 – Vendor Profile

Partnering for Success

N/A – Weaver is not engaging a subcontractor for this scope of work.

Our Experience

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Our Team



John Wauson, CPA | Subject Matter Resource: Risk Assessments
Partner-in-Charge, Risk Advisory Services

John has 16 years of experience, with a career-long focus on providing Risk Advisory Services including enterprise risk management, entity and process-level risk assessments, internal control evaluation and implementation, outsourced and co-sourced internal audit, process improvement and re-engineering, SOX compliance consulting, fraud prevention and outsourced accounting and financial reporting assistance. John is the partner-in-charge of the Risk Advisory practice for the firm, but is also highly focused on client service delivery and takes a hands-on approach with all of his clients.

He is deeply experienced with identifying and assessing risk at all levels of the organization and developing response plans to manage and mitigate inherent risks. He regularly assists his clients with designing and implementing internal control structures and activities for a wide-range of strategic, operational, financial and compliance activities.

Representative Clients: [Redacted]

John's full resume is available in Tab 4 – Vendor Profile



Dan Graves, CPA | Subject Matter Resource: Risk Assessments
Partner, Risk Advisory Services

Dan has more than 17 years of experience in public accounting, including 15 years of internal control process and IT risk management. His areas of emphasis include internal audit, risk assessment, internal control consulting and business process improvement, IT audit, technology consulting and fraud prevention. Dan currently leads Weaver's Central Texas Risk Advisory Services professionals.

Representative Clients: [Redacted]

Dan's full resume is available in Tab 4 – Vendor Profile



Brandon Tanous, CIA, CFE, CGAP, CRMA | Subject Matter Resource: Risk Assessments

Partner, Risk Advisory Services

Brandon has over 15 years of internal audit and advisory experience, including extensive work for government entities providing performance assessments, grant and contract monitoring, internal audit, fraud detection, business process improvement, internal control evaluation and risk management. He also has experience conducting quality assessment reviews for state agencies.

Representative Clients: [REDACTED]

Brandon's full resume is available in Tab 4 – Vendor Profile



Morgan Page, CIA | Subject Matter Resource: Risk Monitoring

Partner-in-Charge, Digital Transformation and Automation Services

Morgan has 13 years of public accounting and industry experience in executing business process improvement engagements, working with organizations to define and monitor critical risk attributes, and operating as a subject matter expert on multiple application implementation teams to ensure organizational risks are identified and addressed. He has experience in planning and executing many different types of engagements including internal audits; reporting and tool development engagements; business impact analyses; disaster recovery / business continuity planning evaluations and engagements

Representative Clients: [REDACTED]

Morgan's full resume is available in Tab 4 – Vendor Profile



Adam Jones | Subject Matter Resource: Strategic Management

Senior Advisor, Risk Advisory Services

Following a long and distinguished career in state government, Adam is particularly regarded for his experience and insight with regard to managing organizational change and maximizing organizational performance. He understands human resources, contracting and procurement, organization development, finance, accounting, information technology, grants management, external relations, rule-making and risk assessment.

Representative Clients: [REDACTED]

Adam's full resume is available in Tab 4 – Vendor Profile



Marci Sundbeck, CIA, CISA, CCSA, CFE, CRMA | Senior Consultant

Marci has more than 30 years of audit and advisory experience in state government, including 25 years of experience with the Employees Retirement System of Texas, a fiduciary fund of more than \$35 billion in net assets. Having served as both the Director of Enterprise Risk Management and the Director of Internal Audit, Marci has extensive experience developing and managing governance and enterprise risk management programs and processes in government environments.

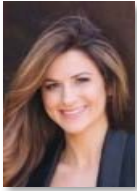
Representative Clients:

[Redacted client information]

Professional Involvement, Additional Certifications and Education

- Member, Association of Public Pension Fund Auditors (APPFA)
 - Immediate Past President 2007 – 2009
 - President 2005 – 2007
 - Vice President 2002 – 2005
 - Director 2001 – 2002
- Member, Institute of Internal Auditors (IIA)
 - Austin Chapter Board of Governors 2012 – 2015
- Member, Association of Certified Fraud Examiners (ACFE)
 - Austin Area Chapter Director 2004 – Present
- Member, Information Systems Audit and Control Association (ISACA)
- Member, State Agency Internal Audit Forum (SAIAF)
 - Vice Chair 1998 – 2000s
- Certified Internal Auditor (CIA), Certified Information Systems Auditor (CISA), Certification in Control Self-Assessment (CCSA), Certified Fraud Examiner (CFE) and Certification in Risk Management Assurance (CRMA)
- Bachelor of Business Administration, Texas A&M University

Holly Hart, CPA, CIA | Manager, Risk Advisory Services



Holly has over 10 years of experience providing objective performance and internal audit services involving federal programs and compliance with regulations, effectiveness and efficiency of key municipal government operations, performance oversight and governance practices, and financial/ operational risk analysis internally and for not-for-profit business partners. Holly is also experienced in driving process improvement efforts to enhance internal audit procedures, mentor new auditors, and develop training opportunities that strengthen auditor skills and impact for the benefit of the communities our clients serve.

Holly formerly served as an Assistant City Auditor for City of Dallas' Office of the City Auditor, as well as an Auditor for the U.S. Department of the Interior. She currently serves as Adjunct Instructor for Dallas College's Career and Technical Education/CPA program at the Mountain View Campus, with courses including Government & Not-For-Profit Accounting and Audit Theory.

Representative Clients:

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Professional Involvement, Education and Certifications

- Member, IIA and Intergovernmental Audit Forums (Southeastern/Western)
- Association of Government Accountants (AGA)
 - Former Board Member of the Dallas Chapter (2016 – 2019)
- Association of Local Government Auditors (ALGA)
 - Current Member, Professional Issues Committee and Peer Review
- CPA and Certified Internal Auditor (CIA)
- Bachelor and Master of Science in Accounting and Information Management, University of Texas at Dallas

Our Approach to Services

- a. Build enterprise risk management and support the development of a risk-aware culture
- b. Formulate a strategy to improve performance, increase productivity and reduce risk

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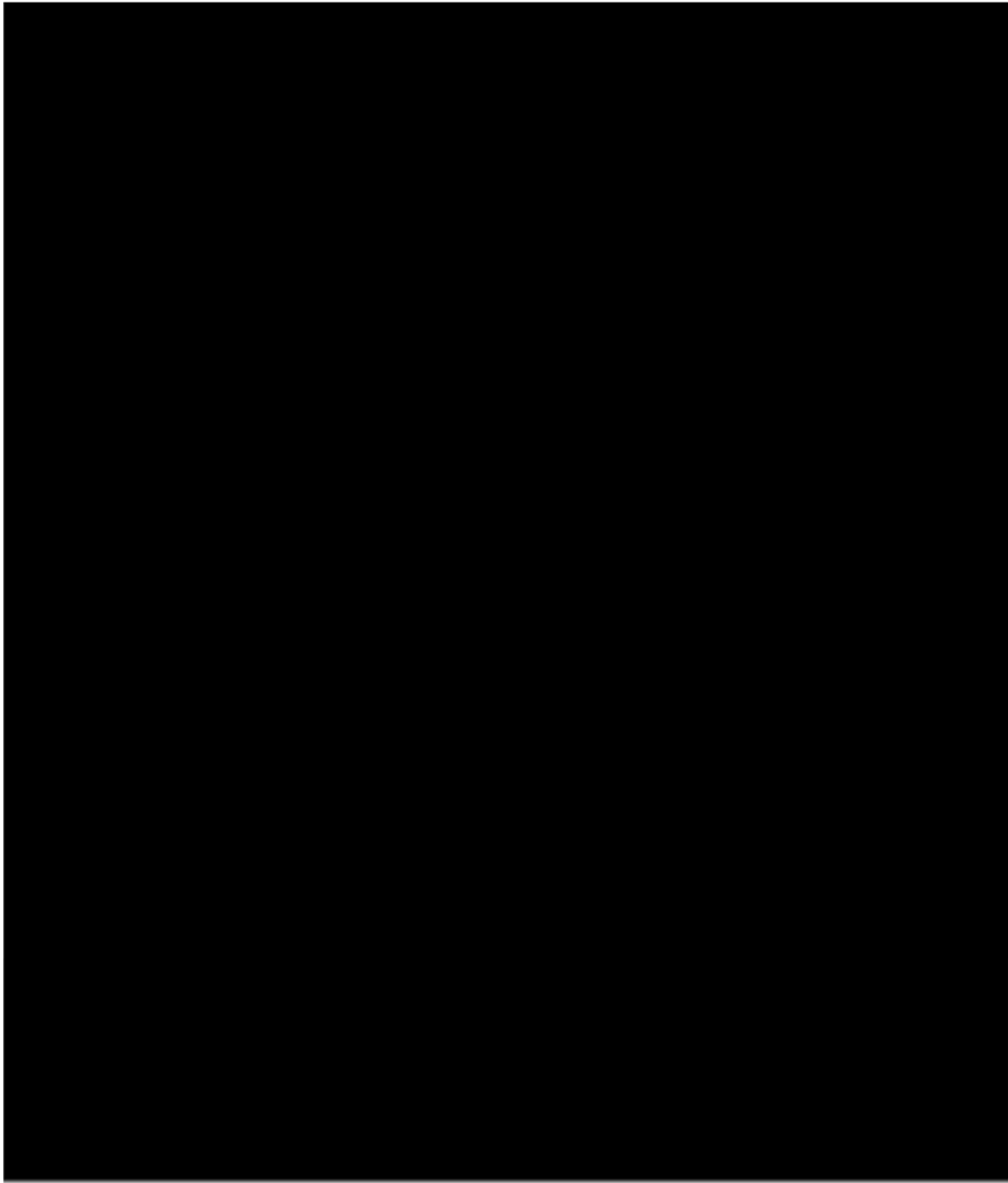
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Tab 6 – References



References – Weaver

Our clients can speak far better than we could to the quality of services we have provided. In full compliance with your requirements, we list each reference with the requisite attributes and the annual volume that are for products and/or services of similar scope and dated within the past three years. Our references range from across all eligible government entity groups, including: K-12, higher education, city, county, and non-for-profit entities.

As Weaver does not at this time participate in the Procurated review system, we understand that our references will be rated solely on those provided rather than on having a Procurated score.



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References – IntegerHealth



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References – The Goodman Corporation



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References – Alvarez and Marsal



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References – Mass Ingenuity



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Tab 7 – Pricing



Cost-efficiency has long been a Weaver hallmark; we pride ourselves on offering extensive capabilities at a reasonable cost, particularly to government entities. Our pricing reflects the level of insight and technical knowledge our team brings, focused on helping you meet both your immediate objectives and your long-term goals.



Weaver understands that withdrawal of our response will not be allowed for a period of 120 days following the opening of this RFP process, as well that our pricing proposal will remain firm for 120 days from proposal response submittal.

Weaver professionals are all committed to setting up a fair, group priced set of strategic management consulting services contracted for through this MSA at the best possible rates for Region 14 ESC and participating agencies under NCPA.

PER RFP REQUIREMENTS, PRICING IS SUBMITTED UNDER SEPARATE COVER.

Addressing Scope Changes

There should never be surprises when it comes to costs.

While exact hours are sometimes difficult to estimate in engagements with multiple moving pieces, Weaver will always keep our clients fully up-to-date on costs incurred and how we're tracking against the pre-approved numbers. Keeping fees transparent and reasonable is just one way we demonstrate a commitment to our clients. If you're ever unsatisfied with your fee, please don't hesitate to let us know; we want our relationship with you to be long-term and mutually beneficial. This statement is true for all of Region 14 ESC members and all participating entities within NCPA.

Tab 8 – Value-Added Products and Services



Continuing Professional Education

Weaver wants to furnish you with the information and support you need to master many different operational challenges. That's why we provide a constant stream of accredited CPE events, webinars, podcasts, toolkits and research on issues facing our clients.

Weaver is a registered provider of CPE by the TXCPA and an accredited CPE provider to the New York State Society of CPAs. These sessions are led by dedicated, industry-specific, professionals within our firm and include breakout sessions so you can customize your CPE day to your most critical needs.



We're also available to provide updates and other CPE-accredited training to your staff upon request – **for example, we currently provide tailored CPE for City of Dallas staff.** In addition, we routinely conduct free webinars (typically occurring over the lunch hour) that offer a way for you to remain plugged in to the industry updates and trends without leaving your office.

Weaver Wednesdays

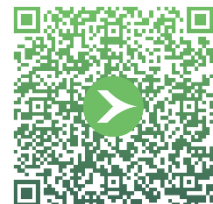
Every October, Weaver hosts "Weaver Wednesdays," a series of virtual Government CPE Training that includes a range of hot topics for financial and accounting leaders. 2022's sessions cover the latest compliance requirements and GASB updates as well as timely topics impacting government operations such as cybersecurity, fraud prevention and digital transformation. Sessions have included:



- ▶ Correctly Calculating Net Investment in Capital Assets
- ▶ State of Organizational Risks
- ▶ Annual GASB Update
- ▶ Fraud Detection & Prevention: Leveraging Data Monitoring and Analytics
- ▶ The Five Traits of Difference Makers
- ▶ Digital Transformation, Catching (and Riding) the Wave!
- ▶ Preparing for GASB 96 – Subscription Based IT Arrangements
- ▶ "NextGen" & "Advanced" Cyber Capabilities are the New Expected Basics

Weaver's 2022 series has recently concluded and will be available for ongoing viewing at a later date. In the meantime, please follow the QR Code above to access Weaver's 2021 Government CPE Series.

In addition to timely thought leadership via blogs and webinars, Weaver also publishes a podcast, *Weaver: Beyond the Numbers – The Business of Government* aimed at government leaders. Follow the QR Code to access the most recent episode, "Digital Transformation: Changing the Government Environment."



Additional Services

Advisory Services

Weaver's broader Advisory Services practice is made up of dedicated professionals who focus on helping clients establish governance, manage risk and maintain compliance.

Weaver's **Risk Advisory Services** professionals are recognized for their breadth and depth of experience in all phases of risk management, from internal control evaluations over individual processes to complete enterprise risk management.

They bring many years of experience performing risk assessments, and providing co-sourced and outsourced internal audit services for a wide of variety clients — including numerous government entities.

The professionals in our robust **IT Advisory Services** group have extensive experience providing internal audit, cybersecurity and other IT-focused assessments.

 <p>Governance Risk Assessment Internal Controls</p>	 <p>Risk Enterprise, Entity-Level and Process-Level Risk Assessments, Internal Audit</p>
 <p>Compliance Program Development, Review, Program Monitoring, Sarbanes-Oxley Services</p>	 <p>Performance Business Process Analysis, Business Process Improvement, Performance Audit, Quality Assurance Review</p>
 <p>Government Consulting Services Strategy, Operations, Technology & Human Resources</p>	 <p>Asset Management Consulting Internal Audit, Compliance, Risk & Management Consulting for Investment Advisors & Asset Managers</p>

 <p>IT Internal Audit Risk assessment Internal controls</p>	 <p>Cybersecurity Develop, maintain and monitor up-to-date cybersecurity programs</p>	 <p>Payment Card Industry Data Security Standards Comply with credit card security requirements</p>	 <p>CIO Advisory Services Strategic and organizational guidance</p>
 <p>SOC Examination Services SOC 1, 2, and 3 SOC for Cybersecurity SOC for Supply Chain</p>	 <p>IT Compliance Meet your industry's standard framework: HIPAA, PCI, FDICIA, GLBA, CCPA, NIST, ISO 27001 and more</p>	 <p>Consulting Organization, strategy, implementation or problem- solving</p>	 <p>Digital Transformation & Business Automation Find the answers hidden in data you already have</p>

Please note that Weaver is also responding to the Region 14 ECS/NCPA RFP for IT Security Products and Data Protection Solutions (Solicitation Number 40-22).

Forensic Accounting and Fraud Investigation

When an organization faces questions about whether fraud may have occurred, leaders are often left wondering: **“What should we do now?”**



Weaver can help.

We have extensive experience conducting forensic accounting investigations for governmental entities, many of which involve allegations of fraud or other suspected improprieties. Mature processes with strong internal controls can prevent these issues – but if an incident ever does arise, Weaver professionals can help you get to the bottom of it.

Our team has completed high-profile investigations for entities such as [REDACTED] Our team:

- ▶ **Conducts** in-depth, probing witness interviews, many of which seek admissions of culpability
- ▶ **Identifies** and gathers evidence of intentional, fraudulent conduct
- ▶ **Analyzes** large volumes of electronic and hard-copy information, employing the latest data mining and analytic techniques
- ▶ **Prepares** comprehensive summary reports with appropriate supporting documentation
- ▶ **Works** with prosecutors and law enforcement agencies by providing the forensic accounting component of their criminal investigations and trials

Weaver’s investigative reports have been relied upon by law enforcement agencies such as the Department of Justice and FBI, including recent investigative engagements with [REDACTED], both of which resulted in successful prosecutions for embezzlement and misapplication of government funds.



Below is high-level overview of our approach:

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Grant Management Services

The Weaver team's end-to-end grant management, administration and compliance process is focused on taking each client and subrecipients past barriers, gaps and noncompliance to help them meet their strategic goals.

We look beyond the day's paperwork to examine underlying processes and support the effective use of funds to:

- ▶ **Design** grant management to maximize grant funding
- ▶ **Collaborate** with internal and external stakeholders to ensure impactful use
- ▶ **Develop** compliant policies and procedures to minimize risk
- ▶ **Monitor** and review grant compliance
- ▶ **Audit** grant expenditures
- ▶ **Evaluate** grant controls
- ▶ **Create** effective frameworks aligned with treasury guidance for reporting compliance
- ▶ **Ensure** compliance with the U.S. Treasury rules and regulations to avoid a loss of stakeholder and community confidence

"Weaver has done a fantastic job reviewing our policies and procedures to fill in any missing information or requirements needed for its CDBG-DR grant. **With their assessments, not only do they identify missing information, but areas of enhancement that could use more documentation or clarification.**

Weaver is extremely easy to communicate with and is very responsive. Even after an audit visit has concluded, they are more than willing to provide further guidance or information to assist in correcting a finding. We truly enjoy our relationship with Weaver and look forward to working with them in the future. **They have absolutely brought valuable knowledge and guidance to our program."**

-Weaver Government Client (2021)



RELEVANT GRANT-RELATED
PROJECT EXPERIENCE



Sample Approach: Grant Administration

Our team is here to take on that lift and make sure our clients' teams can continue their important work. The following is a sample approach for a grant administration, compliance and closeout engagement.



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Because of the overlapping of eligibility within many grants, we'll develop a strategy to help maximize grant funding with the coordination of benefits while, at the same time, avoiding duplication of benefits that can otherwise cause de-obligation in the future.

Tab 9 – Required Documents



Federal Funds Certifications

FEDERAL FUNDS CERTIFICATIONS

Participating Agencies may elect to use federal funds to purchase under the Master Agreement. The following certifications and provisions may be required and apply when a Participating Agency expends federal funds for any purchase resulting from this procurement process. Pursuant to 2 C.F.R. § 200.326, all contracts, including small purchases, awarded by the Participating Agency and the Participating Agency's subcontractors shall contain the procurement provisions of Appendix II to Part 200, as applicable.

APPENDIX II TO 2 CFR PART 200

(A) Contracts for more than the simplified acquisition threshold currently set at \$250,000, which is the inflation adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by 41 U.S.C. 1908, must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate.

- Pursuant to Federal Rule (A) above, when a Participating Agency expends federal funds, the Participating Agency and Offeror reserves all rights and privileges under the applicable laws and regulations with respect to this procurement in the event of breach of contract by either party.

(B) Termination for cause and for convenience by the grantee or subgrantee including the manner by which it will be effected and the basis for settlement. (All contracts in excess of \$10,000)

- Pursuant to Federal Rule (B) above, when a Participating Agency expends federal funds, the Participating Agency reserves the right to terminate any agreement in excess of \$10,000 resulting from this procurement process in the event of a breach or default of the agreement by Offeror as detailed in the terms of the contract

(C) Equal Employment Opportunity. Except as otherwise provided under 41 CFR Part 60, all contracts that meet the definition of "federally assisted construction contract" in 41 CFR Part 60-1.3 must include the equal opportunity clause provided under 41 CFR 60-1.4(b), in accordance with Executive Order 11246, "Equal Employment Opportunity" (30 CFR 12319, 12935, 3 CFR Part, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and implementing regulations at 41 CFR part 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor."

- Pursuant to Federal Rule (C) above, when a Participating Agency expends federal funds on any federally assisted construction contract, the equal opportunity clause is incorporated by reference herein.

(D) Davis-Bacon Act, as amended (40 U.S.C. 3141-3148). When required by Federal program legislation, all prime construction contracts in excess of \$2,000 awarded by non-Federal entities must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 CFR Part 5, "Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction"). In accordance with the statute, contractors must be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay

wages not less than once a week. The non-Federal entity must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency. The contracts must also include a provision for compliance with the Copeland "Anti-Kickback" Act (40 U.S.C. 3145), as supplemented by Department of Labor regulations (29 CFR Part 3, "Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States"). The Act provides that each contractor or subrecipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency.

- Pursuant to Federal Rule (D) above, when a Participating Agency expends federal funds during the term of an award for all contracts and subgrants for construction or repair, offeror will be in compliance with all applicable Davis-Bacon Act provisions
- Any Participating Agency will include any current and applicable prevailing wage determination in each issued solicitation and provide Offeror with any required documentation and/or forms that must be completed by Offeror to remain in compliance the applicable Davis-Bacon Act provisions.

(E) Contract Work Hours and Safety Standards Act (40 U.S.C. 3701-3708). Where applicable, all contracts awarded by the non-Federal entity in excess of \$100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5). Under 40 U.S.C. 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence.

- Pursuant to Federal Rule (E) above, when a Participating Agency expends federal funds, offeror certifies that offeror will be in compliance with all applicable provisions of the Contract Work Hours and Safety Standards Act during the term of an award for all contracts by Participating Agency resulting from this procurement process.

(F) Rights to Inventions Made Under a Contract or Agreement. If the Federal award meets the definition of "funding agreement" under 37 CFR §401.2 (a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that "funding agreement," the recipient or subrecipient must comply with the requirements of 37 CFR Part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements," and any implementing regulations issued by the awarding agency.

- Pursuant to Federal Rule (F) above, when federal funds are expended by Participating Agency, the offeror certifies that during the term of an award for all contracts by Participating Agency resulting from this procurement process, the offeror agrees to comply with all applicable requirements as referenced in Federal Rule (F) above

(G) Clean Air Act (42 U.S.C. 7401-7671q.) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387), as amended— Contracts and subgrants of amounts in excess of \$150,000 must contain a provision that requires the non- Federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401- 7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251- 1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).

- Pursuant to Federal Rule (G) above, when federal funds are expended by Participating Agency, the offeror certifies that during the term of an award for all contracts by Participating Agency member resulting from this procurement process, the offeror agrees to comply with all applicable requirements as referenced in Federal Rule (G) above

(H) Debarment and Suspension (Executive Orders 12549 and 12689)—A contract award (see 2 CFR 180.220) must not be made to parties listed on the government wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR part 1986 Comp., p. 189) and 12689 (3 CFR part 1989 Comp., p. 235), “Debarment and Suspension.” SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549.

- Pursuant to Federal Rule (H) above, when federal funds are expended by Participating Agency, the offeror certifies that during the term of an award for all contracts by Participating Agency resulting from this procurement process, the offeror certifies that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation by any federal department or agency. If at any time during the term of an award the offeror or its principals becomes debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation by any federal department or agency, the offeror will notify the Participating Agency

(I) Byrd Anti-Lobbying Amendment (31 U.S.C. 1352)—Contractors that apply or bid for an award exceeding \$100,000 must file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352. Each tier must also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the non-Federal award.

- Pursuant to Federal Rule (I) above, when federal funds are expended by Participating Agency, the offeror certifies that during the term and after the awarded term of an award for all contracts by Participating Agency resulting from this procurement process, the

offeror certifies that it is in compliance with all applicable provisions of the Byrd Anti-Lobbying Amendment (31 U.S.C. 1352). The undersigned further certifies that:

- No Federal appropriated funds have been paid or will be paid for on behalf of the undersigned, 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 the awarding of a Federal contract, the making of a Federal grant, the making of a Federal loan, the entering into a cooperative agreement, and the extension, continuation, renewal, amendment, or modification of a Federal contract, grant, loan, or cooperative agreement.
- 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 grant or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying", in accordance with its instructions.
- The undersigned shall require that the language of this certification be included in the award documents for all covered sub-awards exceeding \$100,000 in Federal funds at all appropriate tiers and all subrecipients shall certify and disclose accordingly.

RECORD RETENTION REQUIREMENTS FOR CONTRACTS INVOLVING FEDERAL FUNDS

When federal funds are expended by Participating Agency for any contract resulting from this procurement process, offeror certifies that it will comply with the record retention requirements detailed in 2 CFR § 200.334. The offeror further certifies that offeror will retain all records as required by 2 CFR § 200.334 for a period of three years after grantees or subgrantees submit final expenditure reports or quarterly or annual financial reports, as applicable, and all other pending matters are closed.

CERTIFICATION OF COMPLIANCE WITH THE ENERGY POLICY AND CONSERVATION ACT

When Participating Agency expends federal funds for any contract resulting from this procurement process, offeror certifies that it will comply with the mandatory standards and policies relating to energy efficiency which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act (42 U.S.C. 6321 et seq.; 49 C.F.R. Part 18).

CERTIFICATION OF COMPLIANCE WITH BUY AMERICA PROVISIONS

To the extent purchases are made with Federal Highway Administration, Federal Railroad Administration, or Federal Transit Administration funds, offeror certifies that its products comply with all applicable provisions of the Buy America Act and agrees to provide such certification or applicable waiver with respect to specific products to any Participating Agency upon request. Participating Agencies will clearly identify whether Buy America Provisions apply in any issued solicitation. Purchases made in accordance with the Buy America Act must still follow the applicable procurement rules calling for free and open competition.

CERTIFICATION OF ACCESS TO RECORDS

Offeror agrees that the Inspector General of the Agency or any of their duly authorized representatives shall have access to any non-financial documents, papers, or other records of offeror that are pertinent to offeror's discharge of its obligations under the Contract for the purpose of making audits, examinations, excerpts, and transcriptions. The right also includes timely and reasonable access to offeror's personnel for the purpose of interview and discussion relating to such documents. This right of access will last only as long as the records are retained.

CERTIFICATION OF APPLICABILITY TO SUBCONTRACTORS

Offeror agrees that all contracts it awards pursuant to the Contract shall be bound by the foregoing terms and conditions.



Alyssa Martin, CPA | Partner | National Strategy Leader, Large Market & Public Entities
November 17, 2022

Clean Air and Water Act & Debarment Notice

CLEAN AIR AND WATER ACT AND DEBARMENT NOTICE

By the signature below (Under Federal Required Signatures), I, the Vendor, am in compliance with all applicable standards, orders or regulations issued pursuant to the Clean Air Act of 1970, as Amended (42 U.S. C. 1857 (h)), Section 508 of the Clean Water Act, as amended (33 U.S.C. 1368), Executive Order 117389 and Environmental Protection Agency Regulation, 40 CFR Part 15 as required under OMB Circular A-102, Attachment O, Paragraph 14 (1) regarding reporting violations to the grantor agency and to the United States Environment Protection Agency Assistant Administrator for the Enforcement.

I hereby further certify that my company has not been debarred, suspended or otherwise ineligible for participation in Federal Assistance programs under Executive Order 12549, "Debarment and Suspension", as described in the Federal Register and Rules and Regulations.



Alyssa Martin, CPA | Partner | National Strategy Leader, Large Market & Public Entities
November 17, 2022

Contractors Requirements

CONTRACTOR REQUIREMENTS

Contractor Certification

Contractor's Employment Eligibility

By entering the contract, Contractor warrants compliance with the Federal Immigration and Nationality Act (FINA), and all other federal and state immigration laws and regulations. The Contractor further warrants that it is in compliance with the various state statutes of the states it is will operate this contract in.

Participating Government Entities including School Districts may request verification of compliance from any Contractor or subcontractor performing work under this Contract. These Entities reserve the right to confirm compliance in accordance with applicable laws.

Should the Participating Entities suspect or find that the Contractor or any of its subcontractors are not in compliance, they may pursue any and all remedies allowed by law, including, but not limited to: suspension of work, termination of the Contract for default, and suspension and/or debarment of the Contractor. All costs necessary to verify compliance are the responsibility of the Contractor.

The offeror complies and maintains compliance with the appropriate statutes which requires compliance with federal immigration laws by State employers, State contractors and State subcontractors in accordance with the E-Verify Employee Eligibility Verification Program.

Contractor shall comply with governing board policy of the NCPA Participating entities in which work is being performed.

Fingerprint & Background Checks

If required to provide services on school district property at least five (5) times during a month, contractor shall submit a full set of fingerprints to the school district if requested of each person or employee who may provide such service. Alternately, the school district may fingerprint those persons or employees. An exception to this requirement may be made as authorized in Governing Board policy. The district shall conduct a fingerprint check in accordance with the appropriate state and federal laws of all contractors, subcontractors or vendors and their employees for which fingerprints are submitted to the district. Contractor, subcontractors, vendors and their employees shall not provide services on school district properties until authorized by the District.

The offeror shall comply with fingerprinting requirements in accordance with appropriate statutes in the state in which the work is being performed unless otherwise exempted.

Contractor shall comply with governing board policy in the school district or Participating Entity in which work is being performed.

Business Operations in Sudan, Iran

In accordance with A.R.S. 35-391 and A.R.S. 35-393, the Contractor hereby certifies that the contractor does not have scrutinized business operations in Sudan and/or Iran.



Alyssa Martin, CPA | Partner | National Strategy Leader, Large Market & Public Entities
November 17, 2022

Required Clauses for Federal Assistance by FTA

REQUIRED CLAUSES FOR FEDERAL ASSISTANCE PROVIDED BY FTA

ACCESS TO RECORDS AND REPORTS

Contractor agrees to:

- a) Maintain all non-financial books, records, accounts and reports required under this Contract for a period of not less than two (2) years after the date of termination or expiration of this Contract or any extensions thereof except in the event of litigation or settlement of claims arising from the performance of this Contract, in which case Contractor agrees to maintain same until the FTA Administrator, the U.S. DOT Office of the Inspector General, the Comptroller General, or any of their duly authorized representatives, have disposed of all such litigation, appeals, claims or exceptions related thereto.
- b) Permit any of the foregoing parties to inspect all non-financial work, materials, and other data and records that pertain to the Project, and to audit the non-financial books, records, and accounts that pertain to the Project and to reproduce by any means whatsoever or to copy excerpts and transcriptions as reasonably needed for the purpose of audit and examination. The right of access detailed in this section continues only as long as the records are retained.

FTA does not require the inclusion of these requirements of Article 1.01 in subcontracts.

CIVIL RIGHTS / TITLE VI REQUIREMENTS

- 1) Non-discrimination. In accordance with Title VI of the Civil Rights Act of 1964, as amended, 42 U.S.C. § 2000d, Section 303 of the Age Discrimination Act of 1975, as amended, 42 U.S.C. § 6102, Section 202 of the Americans with Disabilities Act of 1990, as amended, 42 U.S.C. § 12132, and Federal Transit Law at 49 U.S.C. § 5332, Contractor or subcontractor agrees that it will not discriminate against any employee or applicant for employment because of race, color, creed, national origin, sex, marital status age, or disability. In addition, Contractor agrees to comply with applicable Federal implementing regulations and other applicable implementing requirements FTA may issue that are flowed to Contractor from Awarding Participating Agency.
- 2) Equal Employment Opportunity. The following Equal Employment Opportunity requirements apply to this Contract:
 - a. Race, Color, Creed, National Origin, Sex. In accordance with Title VII of the Civil Rights Act, as amended, 42 U.S.C. § 2000e, and Federal Transit Law at 49 U.S.C. § 5332, the Contractor agrees to comply with all applicable Equal Employment Opportunity requirements of U.S. Dept. of Labor regulations, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor, 41 CFR, Parts 60 *et seq.*, and with any applicable Federal statutes, executive orders, regulations, and Federal policies that may affect construction activities undertaken in the course of this Project. Contractor agrees



- to take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, creed, national origin, sex, marital status, or age. Such action shall include, but not be limited to, the following: employment, upgrading, demotion or transfer, recruitment or recruitment advertising, layoff or termination, rates of pay or other forms of compensation; and selection for training, including apprenticeship. In addition, Contractor agrees to comply with any implementing requirements FTA may issue that are flowed to Contractor from Awarding Participating Agency.
- b. Age. In accordance with the Age Discrimination in Employment Act (ADEA) of 1967, as amended, 29 U.S.C. Sections 621 through 634, and Equal Employment Opportunity Commission (EEOC) implementing regulations, "Age Discrimination in Employment Act", 29 CFR Part 1625, prohibit employment discrimination by Contractor against individuals on the basis of age, including present and prospective employees. In addition, Contractor agrees to comply with any implementing requirements FTA may issue that are flowed to Contractor from Awarding Participating Agency.
- c. Disabilities. In accordance with Section 102 of the Americans with Disabilities Act of 1990, as amended (ADA), 42 U.S.C. Sections 12101 *et seq.*, prohibits discrimination against qualified individuals with disabilities in programs, activities, and services, and imposes specific requirements on public and private entities. Contractor agrees that it will comply with the requirements of the Equal Employment Opportunity Commission (EEOC), "Regulations to Implement the Equal Employment Provisions of the Americans with Disabilities Act," 29 CFR, Part 1630, pertaining to employment of persons with disabilities and with their responsibilities under Titles I through V of the ADA in employment, public services, public accommodations, telecommunications, and other provisions.
- d. Segregated Facilities. Contractor certifies that their company does not and will not maintain or provide for their employees any segregated facilities at any of their establishments, and that they do not and will not permit their employees to perform their services at any location under the Contractor's control where segregated facilities are maintained. As used in this certification the term "segregated facilities" means any waiting rooms, work areas, restrooms and washrooms, restaurants and other eating areas, parking lots, drinking fountains, recreation or entertainment areas, transportation, and housing facilities provided for employees which are segregated by explicit directive or are in fact segregated on the basis of race, color, religion or national origin because of habit, local custom, or otherwise. Contractor agrees that a breach of this certification will be a violation of this Civil Rights clause.
- 3) Solicitations for Subcontracts, Including Procurements of Materials and Equipment. In all solicitations, either by competitive bidding or negotiation, made by Contractor for work to be performed under a subcontract, including procurements of materials or leases of equipment, each potential subcontractor or supplier shall be notified by Contractor of Contractor's obligations under this Contract and the regulations relative to non-discrimination on the grounds of race, color, creed, sex, disability, age or national origin.

- 4) Sanctions of Non-Compliance. In the event of Contractor's non-compliance with the non-discrimination provisions of this Contract, Public Agency shall impose such Contract sanctions as it or the FTA may determine to be appropriate, including, but not limited to: 1) Withholding of payments to Contractor under the Contract until Contractor complies, and/or; 2) Cancellation, termination or suspension of the Contract, in whole or in part.

Contractor agrees to include the requirements of this clause in each subcontract financed in whole or in part with Federal assistance provided by FTA, modified only if necessary to identify the affected parties.

DISADVANTAGED BUSINESS PARTICIPATION

This Contract is subject to the requirements of Title 49, Code of Federal Regulations, Part 26, "Participation by Disadvantaged Business Enterprises in Department of Transportation Financial Assistance Programs", therefore, it is the policy of the Department of Transportation (DOT) to ensure that Disadvantaged Business Enterprises (DBEs), as defined in 49 CFR Part 26, have an equal opportunity to receive and participate in the performance of DOT-assisted contracts.

- 1) Non-Discrimination Assurances. Contractor or subcontractor shall not discriminate on the basis of race, color, national origin, or sex in the performance of this Contract. Contractor shall carry out all applicable requirements of 49 CFR Part 26 in the award and administration of DOT-assisted contracts. Failure by Contractor to carry out these requirements is a material breach of this Contract, which may result in the termination of this Contract or other such remedy as public agency deems appropriate. Each subcontract Contractor signs with a subcontractor must include the assurance in this paragraph. (See 49 CFR 26.13(b)).
- 2) Prompt Payment. Contractor is required to pay each subcontractor performing Work under this prime Contract for satisfactory performance of that work no later than thirty (30) days after Contractor's receipt of payment for that Work from public agency. In addition, Contractor is required to return any retainage payments to those subcontractors within thirty (30) days after the subcontractor's work related to this Contract is satisfactorily completed and any liens have been secured. Any delay or postponement of payment from the above time frames may occur only for good cause following written approval of public agency. This clause applies to both DBE and non-DBE subcontractors. Contractor must promptly notify public agency whenever a DBE subcontractor performing Work related to this Contract is terminated or fails to complete its Work, and must make good faith efforts to engage another DBE subcontractor to perform at least the same amount of work. Contractor may not terminate any DBE subcontractor and perform that Work through its own forces, or those of an affiliate, without prior written consent of public agency.
- 3) DBE Program. In connection with the performance of this Contract, Contractor will cooperate with public agency in meeting its commitments and goals to ensure that DBEs shall have the maximum practicable opportunity to compete for subcontract work, regardless of whether a contract goal is set for this Contract. Contractor agrees to use good faith efforts to carry out a policy in the award of its subcontracts, agent agreements, and procurement contracts which will, to the fullest extent, utilize DBEs consistent with the efficient performance of the Contract.

ENERGY CONSERVATION REQUIREMENTS

Contractor agrees to comply with mandatory standards and policies relating to energy efficiency which are contained in the State energy conservation plans issued under the Energy Policy and Conservation Act, as amended, 42 U.S.C. Sections 6321 *et seq.* and 41 CFR Part 301-10.

FEDERAL CHANGES

Contractor shall at all times comply with all applicable FTA regulations, policies, procedures and directives, listed directly or by reference in the Contract between Public Agency and the FTA, and those applicable regulatory and procedural updates that are communicated to Contractor by Public Agency, as they may be amended or promulgated from time to time during the term of this contract. Contractor's failure to so comply shall constitute a material breach of this Contract.

INCORPORATION OF FEDERAL TRANSIT ADMINISTRATION (FTA) TERMS

The provisions include, in part, certain Standard Terms and Conditions required by the U.S. Department of Transportation (DOT), whether or not expressly set forth in the preceding Contract provisions. All contractual provisions required by the DOT and applicable to the scope of a particular Contract awarded to Contractor by a Public Agency as a result of solicitation, as set forth in the most current FTA Circular 4220.1F, published February 8th, 2016, are hereby incorporated by reference. Anything to the contrary herein notwithstanding, all FTA mandated terms shall be deemed to control in the event of a conflict with other provisions contained in this Contract. Contractor agrees not to knowingly perform any act, knowingly fail to perform any act, or refuse to comply with any reasonable public agency requests that would directly cause public agency to be in violation of the FTA terms and conditions.

NO FEDERAL GOVERNMENT OBLIGATIONS TO THIRD PARTIES

Agency and Contractor acknowledge and agree that, absent the Federal Government's express written consent and notwithstanding any concurrence by the Federal Government in or approval of the solicitation or award of the underlying Contract, the Federal Government is not a party to this Contract and shall not be subject to any obligations or liabilities to agency, Contractor, or any other party (whether or not a party to that contract) pertaining to any matter resulting from the underlying Contract.

Contractor agrees to include the above clause in each subcontract financed in whole or in part with federal assistance provided by the FTA. It is further agreed that the clause shall not be modified, except to identify the subcontractor who will be subject to its provisions.

PROGRAM FRAUD AND FALSE OR FRAUDULENT STATEMENTS

Contractor acknowledges that the provisions of the Program Fraud Civil Remedies Act of 1986, as amended, 31 U.S.C. §§ 3801 *et seq.* and U.S. DOT regulations, "Program Fraud Civil Remedies," 49 CFR Part 31, apply to its actions pertaining to this Contract. Upon execution of the underlying Contract, Contractor certifies or affirms, to the best of its knowledge, the truthfulness and accuracy of any statement it has made, it makes, it may make, or causes to be made.

made, pertaining to the underlying Contract or the FTA assisted project for which this Contract Work is being performed.

In addition to other penalties that may be applicable, Contractor further acknowledges that if it makes, or causes to be made, a false, fictitious, or fraudulent claim, statement, submission, or certification, the Federal Government reserves the right to impose the penalties of the Program Fraud Civil Remedies Act of 1986 on Contractor to the extent the Federal Government deems appropriate.

Contractor also acknowledges that if it makes, or causes to be made, a false, fictitious, or fraudulent claim, statement, submission, or certification to the Federal Government under a contract connected with a project that is financed in whole or in part with Federal assistance originally awarded by FTA under the authority of 49 U.S.C. § 5307, the Government reserves the right to impose the penalties of 18 U.S.C. § 1001 and 49 U.S.C. § 5307 (n)(1) on the Contractor, to the extent the Federal Government deems appropriate.

Contractor agrees to include the above clauses in each subcontract financed in whole or in part with Federal assistance provided by FTA. It is further agreed that the clauses shall not be modified, except to identify the subcontractor who will be subject to the provisions.




Alyssa Martin, CPA | Partner | National Strategy Leader, Large Market & Public Entities
November 17, 2022

Federal Required Signatures

FEDERAL REQUIRED SIGNATURES

Offeror certifies compliance with all provisions, laws, acts, regulations, etc. as specifically noted in the pages above. It is further acknowledged that offeror agrees to comply with all federal, state, and local laws, rules, regulations and ordinances as applicable.

Offeror	<u>Weaver and Tidwell, L.L.P.</u>
Address	<u>2300 North Field Street, Suite 1000</u>
City/State/Zip	<u>Dallas, TX 75201</u>
Authorized Signature	<u></u>
Date	<u>November 17, 2022</u>

Antitrust Certification Statements

ANTITRUST CERTIFICATION STATEMENTS TEXAS GOVERNMENT CODE § 2155.005

I affirm under penalty of perjury of the laws of the State of Texas that:

(1) I am duly authorized to execute this contract on my own behalf or on behalf of the company, corporation, firm, partnership or individual (Company) listed below;

(2) In connection with this bid, neither I nor any representative of the Company has violated any provision of the Texas Free Enterprise and Antitrust Act, Tex. Bus. & Comm. Code Chapter 15;

(3) In connection with this bid, neither I nor any representative of the Company has violated any federal antitrust law; and

(4) Neither I nor any representative of the Company has directly or indirectly communicated any of the contents of this bid to a competitor of the Company or any other company, corporation, firm, partnership or individual engaged in the same line of business as the Company.

Company Name Weaver and Tidwell, L.L.P.

Address 2300 North Field Street, Suite 1000

City/State/Zip Dallas, TX 75201

Telephone Number

Fax Number

Email Address

Printed Name Alyssa Martin, CPA

Title Partner | National Strategy Leader, Large Market & Public Entities

Authorized Signature 

State Notice Addendum

STATE NOTICE ADDENDUM

The National Cooperative Purchasing Alliance (NCPA), on behalf of NCPA and its current and potential participants to include all county, city, special district, local government, school district, private K-12 school, higher education institution, state, tribal government, other government agency, healthcare organization, nonprofit organization and all other Public Agencies located nationally in all fifty states, issues this Request for Proposal (RFP) to result in a national contract.

For your reference, the links below include some, but not all, of the entities included in this proposal:

http://www.usa.gov/Agencies/State_and_Territories.shtml

<https://www.usa.gov/local-governments>



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