



**COMMONWEALTH OF VIRGINIA
STANDARD CONTRACT**

Contract No. UCPJMU6829

This contract entered into this 21st day of February, 2024, by Deloitte & Touche LLP, hereinafter called the "Contractor" and Commonwealth of Virginia, James Madison University called the "Purchasing Agency".

WITNESSETH that the Contractor and the Purchasing Agency, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:

SCOPE OF CONTRACT: The Contractor shall provide the services to the Purchasing Agency as set forth in the Contract Documents.

PERIOD OF PERFORMANCE: From February 21, 2024 through February 20, 2025 with four (4) one-year renewal options.

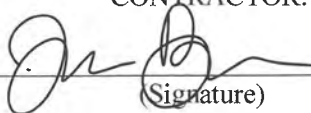
The contract documents shall consist of:

- (1) This signed form;
- (2) The following portions of the Request for Proposal RFP FDC-1189 dated October 2, 2023
 - (a) The Statement of Needs,
 - (b) The General Terms and Conditions,
 - (c) The Special Terms and Conditions together with any negotiated modifications of those Special Conditions;
 - (d) Addendum No. One October 24, 2023
- (3) The Contractor's Proposal dated November 2, 2023 and the following negotiated modification to the Proposal, all of which documents are incorporated herein.
 - (a) Negotiations Summary, dated January 18, 2024

IN WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound thereby.

CONTRACTOR:

By: _____


(Signature)

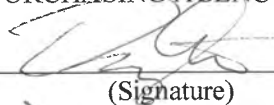
Julie Beecher

(Printed Name)

Title: Managing Director

PURCHASING AGENCY:

By: _____


(Signature)

Doug Chester
(Printed Name)

Title: Buyer Senior

**RFP # FDC-1189 Sponsored Programs Evaluation Services
Negotiation Summary for Deloitte & Touche, LLP**

January 18, 2024

1. Parties agree that this Negotiation Summary modifies RFP# FDC-1189 and the Contractor's initial response to RFP# FDC-1189, and in the event of conflict this negotiation summary shall take precedence.
2. Contractor's pricing schedule for the Purchasing Agency is as follows:

Labor Categories (on and offsite)	Hourly Rate
Executive Leader	\$297.00
Engagement Leader	\$287.10
Senior Subject Matter Expert	\$277.20
Subject Matter Expert	\$237.60
Evaluation Manager	\$227.70
Project Manager	\$222.75
Statistician	\$198.00
Senior Evaluation Analyst	\$188.10
Evaluation Analyst	\$168.30
Task Lead	\$178.20
Human Center Design Analyst	\$148.50
Performance Management Analyst	\$138.60
Functional Analyst	\$158.40
Policy Analyst	\$118.80
Behavioral Health Analyst	\$128.70
Junior Evaluation Analyst	\$89.10
Administrative Support	\$59.40
Senior Evaluation Manager	\$257.40

3. Deloitte & Touche, LLP and JMU will engage in discussions regarding projects as the need arises. Both parties will collaboratively establish a clear scope of work, and a consensus will be reached on the applicable hourly rate(s) and reimbursable expenses for the project as may be mutually agreed upon in advance.

The Contractor shall not be reimbursed for, nor will James Madison University purchase, any operational needs or expenses of the Contractor, which includes, but is not limited to, office supplies and equipment, computers and accessories, and office furniture.

4. Billable hours shall be for actual work hours on authorized projects/tasks rounded to the quarter hour.
5. Should travel be required during the term of this contract, all travel Contractor billing for travel related expenses must invoice in accordance with the U. S. General Services Administration (GSA) for lodging, meals and incidental expenses at the time of travel, which can be referenced at: <http://www.jmu.edu/finprocedures/4000/4215mie.shtml>.

Transportation for air travel and car rental will be paid at cost with Contractor providing a documented receipt to the University. Contractor shall book air travel and car rental to ensure expenses remain economical. Air fare shall be reimbursed for coach/standard with no upgrades and car rental shall be reimbursed for standard with no upgrades.

6. Contractor shall provide detailed invoicing to include project title, number of hours worked onsite and/or offsite, role of individual(s) performing the work, and specific tasks performed.
7. The University may also request that these services be provided as a fixed-fee project, as would be mutually agreed to prior to services being rendered, with deliverables billed upon completion of milestones.
8. The Purchasing Agency reserves the right to reject any assigned personnel at any time with or without cause. Contractor shall provide a suitable replacement within a timely manner.
9. Deloitte & Touche hereby rescinds the all of the redactions and confidential markers in their original proposal.
10. Contractor has disclosed all potential fees. Additional charges will not be accepted.
11. General Term and Condition O.2.c. *CHANGES TO THE CONTRACT* is hereby deleted and replaced with the following:

By mutually agreeing with the contractor to proceed with the work and keep a record of all costs incurred and savings realized. A markup for overhead and profit may be allowed if provided by the contract. The same markup shall be used for determining a decrease in price as the result of savings realized. The contractor shall present the Purchasing Agency with all vouchers and records of expenses incurred and savings realized. The Purchasing Agency shall have the right to audit the records of the contractor as it deems necessary to determine costs or savings. Any claim for an adjustment in price under this provision must be asserted by written notice to the Purchasing Agency within thirty (30) days from the date of receipt of the written order from the Purchasing Agency. If the parties fail to agree on an amount of adjustment, the question of an increase or decrease in the contract price or time for performance shall be resolved in accordance with the procedures for resolving disputes provided by the Disputes Clause of this contract or, if there is none, in accordance with the disputes provisions of the Commonwealth of Virginia Purchasing Manual for Institutions of Higher Education and their Vendors. Neither the existence of a claim nor a dispute resolution process, litigation or any other provision of this contract shall excuse the contractor from promptly complying with the changes ordered by the Purchasing Agency or with the performance of the contract generally.

12. General Term and Condition Q.3. *INSURANCE* is hereby deleted and replaced with the following:

Commercial General Liability: \$1,000,000 per occurrence and \$2,000,000 in the aggregate. Commercial General Liability is to include bodily injury and property damage, personal injury and advertising injury, products and completed operations coverage. The Commonwealth of Virginia must be added as an additional insured to the policy by an endorsement and so endorsed on the policy.

13. Special Term and Condition M. *CRIMINAL BACKGROUND CHECKS* clarification is hereby noted and agreed to.
14. Special Term and Condition N. *INDEMNIFICATION* is hereby deleted and replaced with the following:

Contractor agrees to indemnify, defend and hold harmless the Commonwealth of Virginia, its officers, agents, and employees from any claims, damages and actions of any kind or nature, whether at law or in equity, (1) for bodily injury, death, or physical damage to real or tangible personal

property to the extent arising from or caused by the negligence or intentional misconduct of Contractor or its subcontractors while engaged in performing any services of any kind or nature furnished by the contractor provided that such liability is not attributable to the sole negligence of the using agency; and (2) for infringement by a deliverable of any U.S. patent existing at the time of delivery or copyright or any unauthorized use of any trade secret, except to the extent that such infringement or unauthorized use arises from (i) modification of the deliverable other than by Contractor or its subcontractors, or to failure of the using agency to use the deliverables in the manner described by the contractor, (ii) the failure of JMU to use any corrections or modifications made available by Contractor, or (iii) information, materials, instructions, specifications, requirements or designs provided by or on behalf of JMU. If JMU's use of any such deliverable, or any portion thereof, is or is likely to be enjoined by order of a court of competent jurisdiction as such an infringement or unauthorized use, Contractor, at its option and expense, shall have the right to (x) procure for JMU the continued use of such deliverable, (y) replace such deliverable with a non-infringing deliverable, or (z) modify such deliverable so it becomes non-infringing; provided that, if (y) or (z) is the option chosen by Contractor, the replacement or modified deliverable is capable of performing substantially the same function. In the event Contractor cannot reasonably procure, replace or modify such deliverable in accordance with the immediately preceding sentence, Contractor may require JMU to cease use of such deliverable and refund the professional fees paid to Contractor with respect to the services giving rise to such deliverable. The foregoing provisions of this Section constitute the sole and exclusive remedy of JMU, and the sole and exclusive obligation of Contractor, relating to a claim that any of Contractor's deliverables infringes any patent, copyright or other intellectual property right of a third party.

15. Special Term and Condition *LIMITATION OF LIABILITY* is here by added as the following:

The contractor, its subcontractors, and their respective personnel shall not be liable to JMU for any claims, liabilities, or expenses relating to this Contract, any Statement of Work/Purchase Order, or the Services ("Claims") for an aggregate amount in excess of two times (2x) the fees paid by JMU to the contractor under such Statement of Work/Purchase Order, except to the extent resulting from the recklessness or intentional misconduct of the contractor or its subcontractors. In no event shall the contractor, its subcontractors, or their respective personnel be liable for any consequential, special, indirect, incidental, punitive or exemplary loss, damage, or expense, relating to this Contract, any Statement of Work/Purchase Order, or the Services.

16. Special Term and Condition *DEFAULT* is hereby added as the following:

In case of failure to deliver particular deliverables or services in accordance with the contract terms and conditions, notwithstanding anything to the contrary in this Contract, JMU, after due written notice and an opportunity to cure of at least ten (10) business days, if not then thus cured, may terminate such services and procure them from other sources and seek to hold the contractor responsible for any resulting, reasonably additional purchase and administrative costs to the extent they exceed those that JMU would have paid contractor for the replaced deliverable(s) or services, subject to the limitation of liability in this Contract. The parties agree to negotiate in good faith to establish the actual amount of said additional purchase and administrative costs, or else such shall be determined pursuant to dispute resolution. This remedy shall be in addition to any other remedies which JMU may have.

REQUEST FOR PROPOSAL
RFP# FDC-1189

Issue Date: **October 2, 2023**
Title: **Sponsored Programs Evaluation Services**
Issuing Agency: **Commonwealth of Virginia
James Madison University
Procurement Services MSC 5720
752 Ott Street, Wine Price Building
First Floor, Suite 1023
Harrisonburg, VA 22807**

Period of Contract: From Date of Award Through One Year (Renewable)

Sealed Proposals Will Be Received Until **2:00 PM on November 2, 2023** for Furnishing the Services Described Herein.

SEALED PROPOSALS MAY BE MAILED, EXPRESS MAILED, OR HAND DELIVERED DIRECTLY TO THE ISSUING AGENCY SHOWN ABOVE.

All inquiries for information and clarification should be directed To: Doug Chester, Buyer Senior, Procurement Services, chestefd@jmu.edu; 540-568-4272; (Fax) 540-568-7935 not later than five business days before the proposal closing date.

NOTE: THE SIGNED PROPOSAL AND ALL ATTACHMENTS SHALL BE RETURNED.

In compliance with this Request for Proposal and to all the conditions imposed herein, the undersigned offers and agrees to furnish the goods/services in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation.

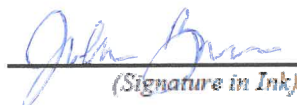
Name and Address of Firm:

Deloitte & Touche LLP

1919 N Lynn St Suite 1500

Arlington, VA 22209

By:


(Signature in Ink)

Name: Julie Beecher

(Please Print)

Title: Managing Director

Date: November 02, 2023

Web Address: <https://www.deloitte.com/us/en.html>

Phone: +1 703 638 0374

Email: jbeecher@deloitte.com

Fax #: _____

ACKNOWLEDGE RECEIPT OF ADDENDUM: #1  #2 _____ #3 _____ #4 _____ #5 _____ (please initial)

SMALL, WOMAN OR MINORITY OWNED BUSINESS:

☐ YES; ☒ NO; ☒ IF YES => ☐ SMALL; ☐ WOMAN; ☐ MINORITY IF MINORITY: ☐ AA; ☐ HA; ☐ AsA; ☐ NW; ☐ Micro

Note: This public body does not discriminate against faith-based organizations in accordance with the *Code of Virginia*, § 2.2-4343.1 or against an offeror because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment.



James Madison University (JMU) Sponsored Programs Evaluation Services

November 2, 2023



Deloitte & Touche LLP
1919 N. Lynn Street
Arlington, VA 22209
United States
www.deloitte.com

November 2, 2023

Mr. Doug Chester
Buyer Senior
Procurement Services
Commonwealth of Virginia
James Madison University
Procurement Services MSC 5720
752 Ott Street, Wine Price Building
First Floor, Suite 1023
Harrisonburg, VA 22807

RE: Sponsored Program Evaluation Services

Dear Mr. Chester & The James Madison University (JMU) Community,

On behalf of Deloitte & Touche LLP (Deloitte¹, Supplier), we are pleased to present our response to James Madison University (JMU or University) for Sponsored Program Evaluation Services (RPF# FDC-1189). We believe Deloitte is uniquely qualified to provide the services requested due to our:

Proven experience in programmatic evaluation providing analysis and developing actionable recommendations for many organizations, including federal agencies, state and local government agencies, and institutions of higher education. Our team has decades of experience driving transformation, growth and change for our clients while navigating the complexities of a rapidly changing research landscape.

Deep bench of subject matter advisors who understand the nuances of program evaluation, research, and research administration, including experienced research administrators and faculty who have been responsible for large, complex research organizations and portfolios at the nation's top research institutions.

Our proposal addresses the information requested in your RFP. We believe Deloitte possesses the knowledge, skills, and capabilities needed to help the JMU research enterprise successfully evaluate sponsored research. We are committed to the success of JMU and are excited by the prospect of working with you and your colleagues. We hope our proposal conveys our enthusiastic commitment to providing a distinctive client service experience designed to produce results.

Our proposal is being made subject to the condition that Deloitte and JMU subsequently reach and enter into a mutually acceptable definitive written agreement for the proposed services. Our experience has indicated that almost without exception we have been able to reach agreement with each of our clients that has awarded us an engagement, including many engagements with public sector clients. We are confident that our experience with JMU will be no different in this case. We believe that the basis for this success lies in the benefit of the negotiation

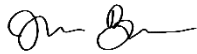
¹ As used in this document, "Deloitte" means Deloitte & Touche LLP, which provides audit and enterprise risk services; and Deloitte Consulting LLP, which provides consulting services. These entities are separate subsidiaries of Deloitte LLP. Deloitte & Touche LLP will be responsible for the services and the other subsidiaries may provide services. Please see www.deloitte.com/us/about for a detailed description of our legal structure. Certain services may not be available to attest clients under the rules and regulations of public accounting. Our services will be performed in accordance with the Statement on Standards for Consulting Services issued by the American Institute of Certified Public Accountants (AICPA).

process which allows each party to understand the other's reasonable concerns. Therefore, if we are awarded this engagement, please trust that Deloitte is open and ready to promptly negotiate mutually agreeable terms with JMU in a collaborative and expeditious manner, and our submission is contingent upon the ability to enter into such negotiations.

Our proposal shall remain valid for 90 days from November 2, 2303. Deloitte shall accept all financial responsibility for all travel expenses incurred for oral presentations (if required) and candidate interviews.

Please feel free to contact Julie Beecher at jbeecher@deloitte.com with any additional questions.

Sincerely,

A handwritten signature in black ink, appearing to read 'Julie Beecher', with a stylized flourish at the end.

Julie Beecher
Managing Director

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Experience, Qualifications, and Prior Evaluations (IV.a,b,&c)

Evaluation Experience and General Evaluation Design

Deloitte is experienced with designing and conducting robust evaluations to meet the needs of a variety of agencies and institutions demonstrating our ability to implement targeted evaluations, synthesize findings from our innovative methodologies, and develop actionable recommendations to guide clients toward achieving their intended goals and objectives. Deloitte is a recognized leader in program evaluations supporting higher education, federal, state, and local agencies, along with clients in commercial and non-profit spaces. These complex settings require a trusted collaborator who can bring a multi-disciplinary team with a broad and deep range of knowledge and skills relevant to evaluations, and Deloitte has a proven track record.

We understand JMU requires a program evaluation collaborator to support various intricate and specialized evaluations throughout the University. Bringing in an external lens to evaluate various programs can further drive improvement, innovation, and lend credibility to findings. We have in-depth experience leading organizations through complex program evaluations. Through this work, we have assisted organizations and institutions in transforming the way they do business and provided insights for program design and efficacy. This, combined with Deloitte's deep bench of professionals with subject matter specialties in various research topics and evaluation methods means we have evaluation professionals who have already encountered and overcome many of the issues that could arise over the course of delivery. We will leverage that wealth of experience and reach back into our deep bench of professionals as needs arise at JMU.

As a trusted advisor to many of the largest government agencies and higher education institutions with more than 20,000 consulting and advisory professionals, we understand the intricacies clients must navigate, as well as the growing pressure they face: the need to increase efficiency, streamline processes, and stay current with the latest technologies and practices so they can operate more effectively. Our professionals have served all 15 US Cabinet-level agencies, 45 states, the District of Columbia, Commonwealth of Puerto Rico and over 500 institutions of higher education. Equipped with lessons learned from serving Government and Public Services (GPS) organizations for over 50 years, our experienced professionals apply industry-leading practices in our approach to program evaluation which have made us a recognized leader in the field. As such, we are able to provide JMU with relevant industry insights, accompanied by proven adoption strategies, deeply informed evaluation technical knowledge, and mixed-methods design approach.

Prior Evaluations of Externally Funded Projects

[PROPRIETARY] As a leader in higher education and federal government consulting, Deloitte has experience conducting comprehensive analyses of similar organizations in various operational and financial areas. Our deep bench of professionals and industry-trained specialists gives us the opportunity to have true insights into all facets of complex university systems and government institutions. The methodological capabilities of our program evaluation specialists, paired with knowledge of higher education programs, enables Deloitte to support JMU in conducting the analyses needed to evaluate the efficacy of their program's implementation, capacity, and impact. Deloitte's skilled professionals bring evaluation, data analysis, and higher education experience, as well as insights based on prior experience.

[PROPRIETARY] Deloitte's Evaluation and Research for Action (ERA) Center of Excellence (CoE) comprises more than 400 practitioners focused on program evaluation, quantitative/qualitative research, and identifying evidence-based practices for federal, state, local, higher education, and nonprofit clients.

Experience, Qualifications, and Prior Evaluations (IV.a,b,&c), Cont.

[PROPRIETARY] Members of this team have advanced degrees in various fields and have designed and implemented a wide array of evaluation studies (e.g., needs, organizational, and evaluability assessments; implementation, process, and outcome evaluations; case studies and systematic reviews; and cost-benefit/effectiveness assessments) both for National Association of State Workforce Agencies (NASWA) (e.g., developing a toolkit to help workforce agencies design and evaluate interventions) and at other government agencies such as the Centers for Disease Control and Prevention (CDC), Federal Emergency Management Agency (FEMA), Defense Health Agency (DHA), Centers for Medicare and Medicaid Services (CMS), and US Agency for International Development (USAID) to name just a few. We have spent our careers designing research and evaluation studies, collecting, and analyzing various data sources, deriving meaning from data, effectively communicating, and publishing findings, and recommending next steps based on evidence to propel organizations forward and drive meaningful action.

[PROPRIETARY] We are providing six relevant professional qualifications to serve as examples of our work, each of which has a completed summary in [Appendix A](#). This volume provides an overview of these past performance projects as well as detailed information on the contract, activities, and impact of each project individually.

[PROPRIETARY]	
Past Performance Project Names to Provide Professional Qualifications	
1.	Virginia Workforce Development Transformation
2.	Centers for Disease Control and Prevention (CDC) Foundation Rapid School Evaluation
3.	Department of Veteran Affairs (VA) Women’s Health Transition Training Pilot
4.	Defense Health Agency (DHA) Ad Hoc Surveys and Public Opinion Polls
5.	Centers for Diseases Control and Prevention (CDC) – 2D Barcode Scanning Project
6.	Listos California Evaluation and Reporting Support

Table 1: Past Performance

Experience, Qualifications, and Prior Evaluations (IV.a,b,&c), Cont.

Overview of Select Past Projects

[PROPRIETARY] We provide below, Table 1, an overview of the six Past Performance Projects (noted with *), as well as six other projects, to share further our recent work across clients, topic areas, and use of various methodologies. Please see [Appendix A](#) for additional information about the six Past Performance Projects. These projects highlight our ability to support JMU with their research/evaluation needs.

[PROPRIETARY] Examples of Past Projects	* Virginia WF Transform.	* CDC Foundn. School Eval	* VA Women Training Pilot	* DHA – Ad Hoc Surveys	* CDC – 2D Barcoding	* California/VV – Listos	Texas – H&HS	VA – Mission Act	FEMA – Emerg. Prep NHS	CMS – Million Hearts	USAID – HIVrIA	NIH – Scientific Workforce
Contract Description												
Multi-year/multi-project contract	✓		✓	✓	✓		✓	✓	✓	✓	✓	✓
Included small-business subcontractor partners		✓	✓	✓	✓		✓	✓	✓		✓	✓
Project Management/Delivery												
Timely work/deliverables submitted	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
High quality work, demonstrated by client feedback/rating	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Project workplan developed	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Regular client meetings/ reporting of progress	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Quality control plan developed/ maintained	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Data security/data sharing plan developed	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Required staffing levels and personnel maintained	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Doctoral-level team leadership		✓		✓	✓	✓	✓	✓	✓	✓	✓	
Design/Methods Used												
Evaluation/Research/Policy/Program Assessment	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Used rigorous design (experimental/ quasi-experimental)			✓	✓	✓		✓	✓			✓	✓
Developed evaluation/plan for design, methods, collection, analysis; Created logic model	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Knowledge development (lit review, env. scan, doc rev)	✓		✓	✓	✓	✓				✓	✓	✓
Developed/piloted instruments/protocols for collection	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Developed IRB/PRA/OMB package			✓	✓	✓				✓	✓	✓	
Used quantitative methodology (surveys, admin records)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Used advanced analytic techniques	✓	✓		✓	✓		✓	✓	✓	✓	✓	✓
Used qualitative methodology (interviews, focus group, observe, case studies, doc rev., social media)	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓
Coded/analyzed qualitative data	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓
Cleaned data/coded/provided files	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Reporting/Recommendations/Dissemination												
Data viz, briefs, and other reporting	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Shared recs for improvements	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Peer-rev. manuscripts/conference		✓	✓	✓	✓			✓	✓		✓	

Table 2: Deloitte's 12 Past Projects

Deloitte's Evaluation Approach (IV.d)

[PROPRIETARY] Deloitte has extensive experience designing and implementing mixed-methods evaluation plans that target programs for higher education clients. We follow a six-pronged process, see Figure 1, that serves as our general evaluation framework.

[PROPRIETARY]



Figure 1: Deloitte's General Evaluation Framework

[PROPRIETARY] Deloitte's evaluation team will use this framework to propose a theory-driven approach to JMU's evaluation needs with convergent mixed-methods across three key phases as follows: **(1) Phase 1: Preparation and Planning (Steps 1 and 2):** key stakeholder engagements to finalize the evaluation plan; **(2) Phase 2: Implementation and Data Collection (Steps 3 and 4):** launch of data collection, data management, and data analysis; and **(3) Phase 3: Synthesis of Findings and Reporting (Steps 5 and 6):** synthesis of findings/design of actionable recommendations.

Phase 1: Preparation and Planning (Steps 1 and 2)

[PROPRIETARY] Deloitte's evaluation practitioners strategically engage client stakeholders to confirm we are accurately describing the program, identifying their evaluation goals, and developing meaningful and relevant key evaluation questions. We then use information collected during this initial preparation to effectively map our evaluation plan to include existing data collection resources, development of tailored data collection protocols, requirements for IRB engagement, and detailed timelines.

[PROPRIETARY] Activities generally used during Phase 1 include the launch of key stakeholder engagements, design of program logic model(s), identification of evaluation questions, and the design of any primary data collection tools using a mixed-methods design (i.e., surveys, focus groups, interviews, observations, tracking, etc.).

[PROPRIETARY] Deloitte generally conducts three key activities during Phase 1: (1) key stakeholder engagements (2) development of program logic model(s), and (3) design of data collection protocols. To start, we will engage JMU stakeholders to confirm our programmatic understanding is accurate and

Deloitte's Evaluation Approach (IV.d), Cont.

[PROPRIETARY] their evaluation expectations are in alignment. Next, we use this information to design program logic models to visually represent (a) the program's inputs and activities, (b) their expected outcomes, and (c) and draw linkages between their activities and outcomes. Logic models are recognized as commonly used tools in evaluations to confirm alignment with a program's objectives back to the overarching evaluation questions. Finally, our evaluators will leverage data from our key informant interviews to develop strategic evaluation questions to guide our overall plan for Phase 2 (see Figure 2 for types of evaluations and targeted questions).

[PROPRIETARY]

Different Types of Evaluation Answer Different Questions

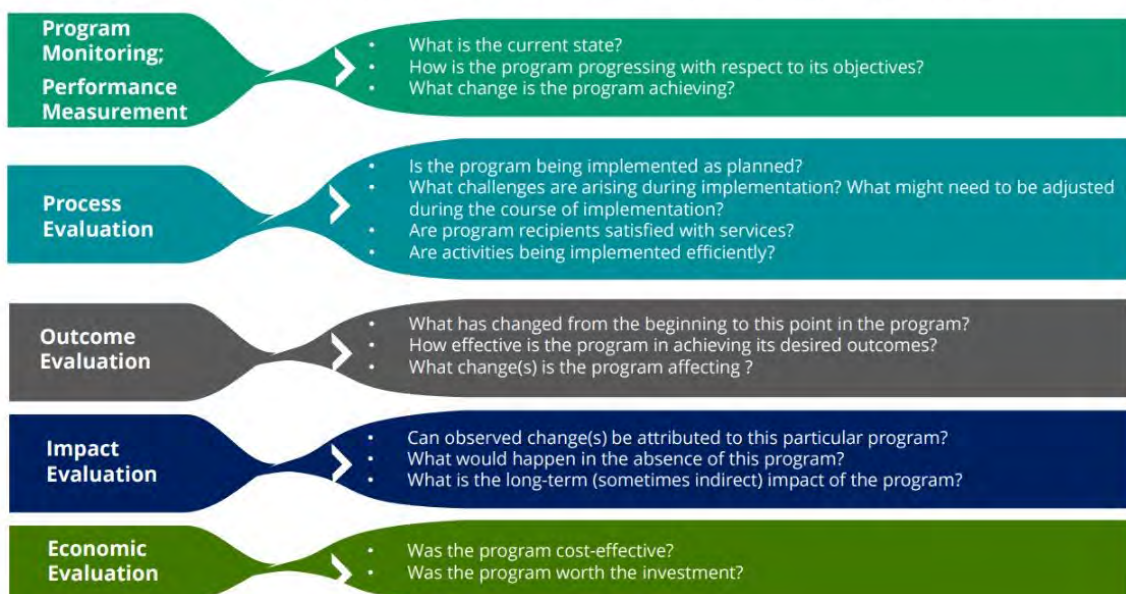


Figure 2: Different Types of Evaluation Answer Different Questions

[PROPRIETARY] These key evaluation questions will form the basis for Deloitte's targeted evaluation plan in addition to serving as an outline guiding our synthesis of findings. Deloitte will use the finalized key evaluation questions to map all activities while confirming that everything we do is easily traced back to JMU's original intent. This plan will also streamline our development of targeted actionable recommendations during Phase 3.

Phase 2: Implementation and Data Collection (Steps 3 and 4)

[PROPRIETARY] During the implementation and data collection phase, our team of diverse evaluators will collect all primary and secondary data using a mixed-methods approach. By mixing quantitative and qualitative data collection methods to collect and analyze data, our team uses robust practices to effectively address client's evaluation questions. Examples of typical data collection efforts used by our teams includes, but is not limited to, the following examples: using secondary data previously collected by clients in addition to landscape analyses, literature reviews, structured interviews, focus groups, surveys, tracking dashboards, observations, etc. We maximize remote data collection as much as possible by using online platforms for interviews and survey development which is also effective for maximizing efficiency.

Deloitte's Evaluation Approach (IV.d), Cont.

[PROPRIETARY] Once all data have been collected, Deloitte will analyze findings to inform actionable recommendations focused on the direction and type of evaluations completed for JMU. Deloitte will identify institutional strengths and highlights any gaps for further inquiry based on all programmatic analyses. If any risks are identified, such as security, data sharing, or privacy concerns, we will input identified risks and develop risk severity ratings for each based on impact and likelihood of that risk occurring.

Phase 3: Synthesis of Findings and Reporting (Steps 5 and 6)

[PROPRIETARY] Finally, all primary and secondary data collected during implementation and data collection are used by our seasoned evaluators to synthesize findings and answer our key evaluation questions. Deloitte's final evaluation reports will be succinct in nature to promote usability, are accompanied by a debrief session with our team, and typically include the following key areas:

- [PROPRIETARY] Summary of program activities.
- [PROPRIETARY] Synthesis of program accomplishments.
 - [PROPRIETARY] Barriers experienced
 - [PROPRIETARY] Successes achieved
 - [PROPRIETARY] Lessons learned
 - [PROPRIETARY] Outstanding needs
 - [PROPRIETARY] Value added
- [PROPRIETARY] Targeted actionable recommendations for future improvement.

[PROPRIETARY] One key component to Deloitte's evaluation approach that we believe sets us apart from competitors is the dedicated time we consistently give to the development of actionable recommendations. Not only do we synthesize findings into digestible reports, but we take our practice to the next level by engaging with our clients on unique actionable recommendations so they can actively use their evaluation findings and translate them into actionable steps toward improvement.

Allocation of Staffing (IV.e.1)

[PROPRIETARY] To support this comprehensive effort, Deloitte will staff each project with a multidisciplinary team of professionals with a combination experience in program evaluation, research administration, specific discipline required for each evaluation, and higher education. This team will work to execute each discrete program evaluation task on time and within budget.

[PROPRIETARY] Each evaluation team will not only be led by a program executive, who is ultimately responsible for delivery excellence, but a project manager who will serve as the first point of escalation, and a project and oversee the day-to-day project delivery. We will also bring a team of analysts and subject matter specialists to assist with providing reasonable assurance that nuance associated with discrete evaluation areas is covered. Please refer to table 2 below and our key personnel section herein for details on our proposed staffing plan.²

[PROPRIETARY] To maintain consistency throughout the life of Deloitte's engagement with JMU, the Deloitte management team will remain consistent from evaluation to evaluation. This will provide confidence that lessons learned and intuitional knowledge flow from evaluation to evaluation.

² Given the ad-hoc nature of the proposed work, Deloitte cannot guarantee that the subject matter specialists, and consultants referenced within this response will be available for each evaluation. Staff with similar experience and background will be deployed as applicable. Project leadership will, however, remain consistent throughout the term of the agreement.

Management Me (IV.e.2)

Following the execution of a Statement of Work and prior to beginning the on-the-ground effort, Deloitte will work with JMU to establish the governance structure for the project and support the development of a project-specific communications approach. Specific activities during this step will include:

Confirm Governance Approach and Project Management Activities

During our initial discussions with JMU we will work with you to establish the project's governance structure. This will be a collaborative process to define governance aligned with the institution's culture. Experience has taught us that having engaged governance committees comprised of senior leadership, a designated Executive Sponsor, and staff is critical to the success of the project.

We recommend that JMU identify an Executive Sponsor charged with providing oversight and guidance to the engagement. This individual will be responsible for defining the vision for the engagement, confirming previously documented guiding principles, and, ultimately, serving as a champion of the work.

[PROPRIETARY] During this first step, we also recommend that JMU establish a Steering Committee to support the effort. The Steering Committee should be comprised of stakeholder representatives from the research enterprise whose responsibility will be to provide feedback on evaluations and approaches as they are developed. This group will validate evaluation approaches, provide feedback on options and recommendations for evaluation plans, and serve as champions of the work. The Steering Committee should consist of selected stakeholders who represent the most salient perspectives involved in the research enterprise.

[PROPRIETARY] We also recommend that JMU identify a key point of contact for the Deloitte team, outlined in our governance structure as the JMU Project Coordinator. This individual will work closely with the Deloitte Project Manager to keep the project on track, confirm access to staff and data in a timely manner and escalate project risks as they become apparent. This individual typically schedules all meetings and supports project communication needs (or delegates this work). Our team will provide status updates to this individual on an ongoing basis based on the discrete evaluation plan.

Develop Detailed Evaluation Charter

[PROPRIETARY] Deloitte will develop an evaluation charter that outlines the timing, activities, milestones, responsible parties, and other key components of the evaluation. The charter will be used to confirm alignment around expectations for the evaluation and as a communication tool.

Processes in Place to Confirm Complete and Accurate Records and Protect Personally Identifiable Information (PII) (IV.e.3&4)

We understand that evaluations require the receipt and use of PII. To this end, Deloitte uses various proprietary tools for the sending and receiving of PII. These tools are used by our project teams across the firm for engagement where PII is received or transferred. We also have a robust data archiving policy and process that requires the archiving of project data after use and need. We will deploy these tools and methods to protect and transmit PII where necessary.

[PROPRIETARY] Following all federal regulations to protect human subjects is of utmost importance. As an experienced primary investigator, we understand the time needed to prepare Institutional Review Board (IRB) documentation and to receive approval. We can utilize the JMU IRB, or as required, we will prepare materials for external IRB for independent protocol review. Deloitte has a federal wide assurance (# FWA00018203 exp 08/24/2027) and uses Solutions IRB, a private AAHRPP Accredited IRB that reviews all levels of research protocols including OHRP regulated research.

[PROPRIETARY] These tools are also used for the transmission of large and complex data sets and have built in controls for the protection of the integrity of the data and the safety of PII. We will also rely on our experience and use of various analytic methods to test data for completeness and accuracy before using large or complex data received.

Potential Use of Subcontractors (IV.e.5)

Deloitte's commitment to inclusion extends to our supply chain. We drive toward broadening our base of minority, women-owned, and other diverse suppliers to provide leading technology and innovative recommendations to our clients. Our Deloitte Office of Small Business and Supplier Diversity Programs builds and leverages relationships with these suppliers. Deloitte creates business opportunity for them by inviting them to participate in the contracting opportunities and delivering strategic programs that enhance suppliers' skills and capabilities development, mentor-protégé relationships, and strategic market growth.

Deloitte seeks small and diverse suppliers of numerous types, as designated by Federal, state, and local governments, and industry organizations, including but not limited to:

[PROPRIETARY] In FY20, we did business with 1,062 diverse and/or small business enterprises, or 8% of the suppliers, representing over \$738 million in procurement spend, or 11% of total supplier spend. On our COR3 project we have ranged from 15% to 25% during our three-year contract.

[PROPRIETARY] Deloitte is an organization committed to diversity and supporting diverse businesses. Through subcontracting relationships, we strive to support Historically Underutilized Businesses through subcontracting and mentoring relationships with these entities. For this MSA we have established a goal of at a minimum of 10% utilization of diverse firms to be determined based on each SOW.

Time and Budget (IV.e.6)

[PROPRIETARY] We are mindful that cost is a consideration in selecting a program evaluator. However, fees alone should not be the determining factor—the decision should also be based on the provider’s ability to provide the level of service that you desire, and a team with whom you can have a long-term, mutually satisfying business relationship. We believe the rates we have proposed are competitive in the market and are based on substantial discounts, reflecting our commitment to further building a trusted and lasting working relationship with you. Our fee structure incorporates hourly rates for our professionals. We recognize that each program evaluation will be unique to the project and will require different skillsets and levels of experience. As such, we have proposed a range of labor categories and rates to allow us the flexibility to provide you with the appropriate practitioners based on each unique program for evaluation. We will bring specialists from several areas to address JMU’s research program evaluation needs. Our proposed hourly rates are provided in the table below.

Labor Categories (on and off site)	[PROPRIETARY]	Hourly Rate
Executive Leader		\$ 300
Engagement Leader		\$ 290
Senior Subject Matter Expert		\$ 280
Senior Evaluation Manager		\$ 260
Subject Matter Expert		\$ 240
Evaluation Manager		\$ 230
Project Manager		\$ 225
Statistician		\$ 200
Senior Evaluation Analyst		\$ 190
Task Lead		\$ 180
Evaluation Analyst		\$ 170
Functional Analyst		\$ 160
Human Centered Design Analyst		\$ 150
Performance Management Analyst		\$ 140
Behavioral Health Analyst		\$ 130
Policy Analyst		\$ 120
Junior Evaluation Analyst		\$ 90
Administrative Support		\$ 60

Table 3: Illustrative Labor Categories

[PROPRIETARY] Deviations from the below evaluation project assumptions may cause changes to the timeline, fees and expenses, deliverables, level of effort required, or otherwise impact Deloitte’s performance of the services and the parties would need to agree on a change order to reflect adjustments to the services and/or pricing for such services as a result thereof.

- [PROPRIETARY] JMU will be available for workshops and meetings in keeping with the time frame of each discrete evaluation and will work with Deloitte to confirm a realistic schedule and calendar.
- [PROPRIETARY] JMU will provide access to evaluation participants, within reason, to meet the proposed project timeline and to address any reasonable and necessary follow-up inquiries during the project.

Time and Budget (IV.e.6), Cont.

- [PROPRIETARY] JMU is responsible for identifying key stakeholders who need to participate in each evaluation.
- [PROPRIETARY] Meetings and workshops shall be conducted virtually.
- [PROPRIETARY] Engagement issues will be escalated by Deloitte and resolved by JMU leadership in a timely manner to adhere with the engagement timeline.
- [PROPRIETARY] JMU shall provide Deloitte with timely access to personnel, facilities and requested data to enable Deloitte to fulfill its obligations hereunder.
- [PROPRIETARY] The scope of the engagement as documented above shall remain unchanged, except as otherwise agreed by Deloitte and JMU in writing.
- [PROPRIETARY] An annual 4% escalation rate will be applied to the rate card provided above if the noted option years are executed.
- [PROPRIETARY] Our proposal is being made subject to the condition that Deloitte and JMU subsequently reach and enter into a mutually acceptable definitive written agreement for the proposed services. Our experience has indicated that almost without exception we have been able to reach agreement with each of our clients that has awarded us an engagement, including many engagements with public sector clients. We are confident that our experience with JMU will be no different in this case. We believe that the basis for this success lies in the benefit of the negotiation process which allows each party to understand the other's reasonable concerns. Therefore, if we are awarded this engagement, please trust that Deloitte is open and ready to promptly negotiate mutually agreeable terms with JMU in a collaborative and expeditious manner, and our submission is contingent upon the ability to enter such negotiations.
- [PROPRIETARY] JMU shall be solely responsible for, among other things (a) the performance of its personnel and agents; and (b) the accuracy and completeness of all data and information provided to Contractor for purposes of the performance of the Services. Our performance is dependent upon the timely and effective satisfaction of JMU's responsibilities and timely decisions and approvals of JMU in connection with the Services. We shall be entitled to rely on all decisions and approvals by JMU. JMU will promptly notify Contractor of any issues, concerns or disputes with respect to the Services.
- [PROPRIETARY] Our services will be performed in accordance with the Statement on Standards for Consulting Services of the American Institute of Certified Public Accountants and will not constitute an engagement to provide audit, compilation, review, or attestation services as described in the pronouncements on professional standards issued by the AICPA the Public Company Accounting Oversight Board, or other regulatory body and, therefore, we will not express an opinion or any other form of assurance as a result of performing the Services.
- [PROPRIETARY] We will not provide any legal advice regarding our Services, nor will we provide any assurance regarding the outcome of any future audit or regulatory examination or other regulatory action; the responsibility for all legal issues with respect to these matters, such as reviewing all deliverables and work product for any legal implications to JMU, will be JMU's.
- [PROPRIETARY] JMU will be responsible for all decisions related to any actions taken by JMU and/or for any procedures implemented by JMU based upon the deliverables provided by Deloitte & Touche. Based upon the Scope of Work, Deloitte & Touche will be assisting in various projects, but will not be providing or including recommendations within its deliverables.

Time and Budget (IV.e.6), Cont.

- [PROPRIETARY] We request your approval to subcontract any part of the services to our affiliates in the United States. Deloitte & Touche will be responsible for the services performed by our affiliates as our subcontractors.

Quality Control Process (IV.f)

Deloitte has a number of programs and requirements in place to monitor compliance with applicable standards. These include required continuing professional education, professional certifications, and ethics and independence monitoring and reporting. We accept only work that we are competent to perform with integrity and objectivity. All engagements are performed under the supervision and review of senior level professionals to facilitate planning, fieldwork, and reporting that meets quality measures and applicable performance standards, as required.

Mechanism to Detect and Reduce Potential Fraud and Errors in Data Collection

Deloitte is a leader in information technology and risk assessment methodologies, and we have demonstrated tools and methodologies to help bring insights and techniques to our clients. We offer a way for organizations across industries to identify potential fraud and corruption exposures, as well as target entities, business processes, and transactions with potentially higher risk factors, without incurring the cost and complexity of building an in-house analytics capability: the Deloitte Analytics Platform.

Deloitte will collaborate with JMU and evaluation leadership all activities that ascertain quality policies, objectives, and responsibilities so that the evaluation program and each discrete evaluation will satisfy the needs for which it was undertaken. Deloitte will support quality assurance by escalating risks, centering stakeholder experiences, maintaining status reports and early forecasting for any quality assurance trends, and adhering to JMU's direction regarding quality management.

Beyond these management steps, Deloitte employs a multi-review process for all deliverables whereby each artifact or deliverable prepared for JMU is not only reviewed by project management but undergoes a quality risk management review to identify areas of risk and quality deficiencies. Our teams will adhere to this process throughout the life of our engagement with JMU.

Analytical Capabilities and Statistical Analysis Software (IV.g)

[PROPRIETARY] Deloitte maintains robust quantitative and qualitative analytical capabilities and specialists who will provide the tools and knowledge to conduct the analytic techniques to address the evaluation questions and meet the needs of JMU. Our team of experienced evaluators, statisticians, industrial and organizational (I/O) psychologists, economists, and data scientists are trained in sophisticated analytic methods. We follow effective methods for the evaluation methodology. We will outline for JMU statistical and non-statistical processes, including procedures for missing data, outliers, and methodological changes. We have proposed analytical methods to address the primary evaluation research questions, which will be refined and validated as we develop and finalize our evaluation approach with JMU. Our analysis will include mixed qualitative and quantitative

[PROPRIETARY] We review collected data for out-of-range values, unintentional duplication, corrupted cases, suspected spam cases, and cases of incorrect or inconsistent instrument routing. If desirable and statistically valid, missing data may be imputed using techniques such as multiple imputation, mean or median replacement, or using machine learning techniques such as K Nearest Neighbors. Additional fields that are necessary to conduct the evaluation will be created using scripted solutions so that the entire data manipulation process can be audited and efficiently replicated or adjusted.

Designing, Coding, and Maintaining Management Information Systems

[PROPRIETARY] Deloitte can leverage its proprietary platforms such as Cortex for Government (CfG) or commercial products such as Qualtrics to analyze data, link multiple datasets, track individual participants, or pull individual records.

Web Scraping

[PROPRIETARY] We use Python to conduct web scraping and gather relevant publicly available data. Web-scraped data is formatted to integrate with other datasets for analysis. We use tools such as our proprietary ContextEdge toolkit of machine learning and natural language processing tools to quickly extract value from unstructured text, voice, and video data.

Convening Technical Working Groups, Subject-Matter Specialists (SMSs), or Peer Review Panels

[PROPRIETARY] We have a network of academic, governmental, and non-governmental program and policy subject matter specialists that we can engage throughout the evaluation process to provide theoretical models, identify expected relationships to test, verify how constructs should be evaluated, and develop statistical approaches to test hypotheses. We may also convene SMSs to advise on which potential datasets should be used in an evaluation, collecting new data, and testing instruments.

Analyzing Data to Answer Complex Research Questions

[PROPRIETARY] Quantitative methods that we have used to perform evaluations include:

- [PROPRIETARY] Time series and forecast modeling to assess trends and predict future outcomes (e.g., pre-post analysis, Box-Jenkins models, autoregressive moving average/autoregressive integrated moving average [ARMA/ARIMA] models)
- [PROPRIETARY] Panel data techniques (e.g., fixed effects models, random effects models, survival/duration analysis to model relationships, difference-in-difference analysis)
- [PROPRIETARY] Cross-sectional analysis (e.g., multiple linear or logistic regression, principal component analysis, exploratory or confirmatory factor analysis, Poisson regression, Tobit regression)

Analytical Capabilities and Statistical Analysis Software (IV.g), Cont.

- [PROPRIETARY] Supervised, unsupervised, and reinforcement machine learning to generate predictions, group data, and optimize outcomes using methods (e.g., classification algorithms, clustering algorithms, Markov decision processes)
- [PROPRIETARY] Mediation/moderation models to understand complex relationships between factors contributing to outcomes of interest
- [PROPRIETARY] Hierarchical modeling to understand impacts or correlations where observations are not independent

[PROPRIETARY] Our practitioners are skilled in conducting quantitative analyses using tools such as Python, R, SPSS, SAS, and Stata and qualitative analyses in tools such as MAXQDA, ATLAS.ti, and NVivo. Tools used will depend on the evaluation and we are flexible to JMU's preferences. We begin by outlining all statistical and non-statistical data analysis processes and determining if any changes to the pre-approved methodology are warranted. We then calculate summary statistics (for quantitative data) and conduct exploratory analysis to identify outliers, phenomena that affect variable selection, and any interesting relationships. Exploration could be quantitative (e.g., crosstabs, ANOVA, chi-square) or qualitative (content, thematic, or sentiment analysis, and other NLP applications). For surveys, we apply weights to account for sample design, nonresponse, and calibration to population parameters and are comfortable calculating statistical rakes and implementing propensity score matching. We then test that the assumptions needed for our methods are met. We fully specify intended evaluation methods in our Evaluation Plan before analysis and explicate the theoretical basis for the relationships we seek to find in the data.

Prior Projects Gathering and Analyzing Data & Data Files and Documentation

[PROPRIETARY] Deloitte will deliver raw, cleaned data and supporting documentation such as codebooks, analysis files, output files, and use manuals that are comprehensive and easy to read. Our evaluation experience informs the way we structure data for archiving so that they are useful and intuitive to researchers. Our data archiving plan (DAP) (5.3.h.i.) will be formalized before data collection so that respondents are informed and can affirmatively consent to the subset of their data to be archived (e.g., if PII will be included) and whether and how the data will be connected to secondary data sources. The DAP will describe fields that should not be archived due to concerns regarding privacy, ownership, or data quality and will define the hierarchy of access permissions to protect privacy while potentially offering some forms of the data (e.g., less granular or censored) to a larger share of the public. We write explicit, detailed instructions to the archiving entity in a communication plan that identifies a storage location (ideally, one that houses similar datasets of interest to expedite future evaluation efforts).

Analyzing the Data [PROPRIETARY]

Deloitte developed and tested three survey instruments for the **National Institutes of Health (NIH) Chief Officer for Scientific Workforce Diversity (COSWD)** NIH to assess the impact of COVID-19 on the biomedical workforce and the NIH staff base. These were reviewed by a panel of experts and underwent cognitive and pilot testing among representative audience samples. The result was a set of relevant, reliable (understood consistently), and valid instruments.

Deloitte fields the **CDC's Office on Smoking and Health (OSH)** National Youth Tobacco Survey. The team conducts cognitive interviews among youth aged 11-17 to understand the perceptions and interpretations of tobacco use related survey items across diverse individual and societal experiences.

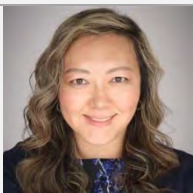
Analytical Capabilities and Statistical Analysis Software (IV.g), Cont.

[PROPRIETARY] The archive may include calculated fields to expedite future evaluation efforts and encourage consistent and valid use of the data across studies. We will comply with all requirements across studies. We will comply with all requirements of the DAP and will coordinate closely with identified archiving entity, answering all questions in a timely manner.

Key Management Personnel (IV.h)

The key individuals listed and identified below are well-versed in the proposed approach and bring knowledge and experience from their various backgrounds in higher education and research administration. Please see [Appendix B](#) for key individuals' detailed resumes.

Julie Beecher, CISA, PMP, JMU Alum: Project Executive [PROPRIETARY]



[PROPRIETARY]

Julie Beecher is a Managing Director with Deloitte in Accounting and Internal Controls with over 23 years of experience performing risk assessments, internal audits, and evaluating controls, improving business processes/supporting policies and procedures, performing compliance reviews, assisting with investigations, and performing general computer and application reviews.

Ms. Beecher coordinates management of Internal Audit (IA) engagements at state and local institutions and private universities and is responsible for the overall delivery of IA services. She advises the client and provides oversight to the IA project teams during the audit life cycle: overall planning, risk assessments, audit plan development, audit execution, workpaper review, and reporting of Deloitte's internal audit activities.

Ms. Beecher's experience includes implementing a stakeholder engagement plan with finance and IT stakeholders, and the external auditor, to manage risk, maintain compliance, and achieve remediation results. Ms. Beecher has helped her team conduct a high-level risk assessment to identify the agency's obligations, and opportunities to enhance, rationalize, and align capabilities across compliance, testing, fraud, and ERM.

Ms. Beecher experience with professional standards such as IIA, GAGAS and GAO.

Previous Clients

- Howard University
- Port Authority New York & New Jersey
- Economic Development Center for NYC
- Delaware State Housing Authority
- South Carolina Treasurer's Office
- AARP
- Amtrak
- Town of Gilbert, AZ
- USPS

Education

Julie received her Bachelor of Business Administration in Finance from James Madison University.

Key Management Personnel (IV.h), Cont.

Dillon Clark, MSSW, MBA, CFE: Engagement Leader / Subject Matter Specialist – Research [PROPRIETARY]



[PROPRIETARY]

Dillon Clark is an Advisory Manager and Certified Fraud Examiner (CFE) in Accounting and Internal Controls with more than nine years of operational redesign, process development and implementation, non-profit and fund accounting, and organizational transformation experience. He has experience managing the full GL cycle of grant funded organizations, local government agencies, and public charter schools. He has led various engagements in areas of government accounting standards implementation, internal control assessments, SOX and JSOX audits, and serves as a Subject Matter Specialist for research and grants accounting, finance, and compliance for institutions of Higher Education, Research Institutions, and Healthcare Institutions. He has financed and led research operations in multiple currencies on multiple continents throughout the country. At Deloitte, Dillon has led the process redesign and roadmap development for one of the largest hospital systems in North Carolina and has advised on various research management advisory engagements in areas including compliance, finance, and operational redesign.

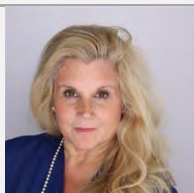
Previous Clients

- Children's Hospital Colorado
- Howard University
- University of California – Nutrition Policy Institute
- Vidant Healthcare
- Texas Women's University
- Banner Health
- UCLA

Education

Dillon is a Certified Fraud Examiner (CFE). He received his Bachelor of Arts in Politics from The Catholic University of America and his Master of Science in Social Enterprise Administration with a concentration in Healthcare policy and practice management from Columbia University. Dillon also received his MBA (Master of Business Administration) with a concentration in Finance from the Quantic School of Business.

Hope Gilbert, Ph.D., MSSW: Senior Subject Matter Specialist – Evaluation Services, Behavioral Health [PROPRIETARY]



[PROPRIETARY]

Dr. Gilbert is a Manager at Deloitte Consulting and has more than 20 years of experience in public health and program evaluation, while supporting federal and state contracts. In her role at Deloitte, she currently serves as a senior healthcare/public health evaluation specialist among Deloitte's Evaluation for Research for Action program evaluation professionals and is also a member of Deloitte's Suicide Prevention Solution Team. She is recognized for leading program evaluation teams with her strong record of evaluation experience as an epidemiologist, public health specialist, and strategic methodologist.

Previous Projects

- Centers for Disease Control and Prevention (CDC)
- Health Resources and Services Administration (HRSA)
- Department of Defense (DoD)
- National Institutes of Health (NIH)
- Office of Women's Health
- Substance Abuse and Mental Health Services Administration (SAMHSA)
- Defense Center of Excellence

Education

Dr. Gilbert received her Bachelor of Science in Biology from University of Mississippi. She received her Master of Science in Social Work, Clinical Science and Social Work from University of Tennessee Medical Center and her PhD in Psychiatric Epidemiology from Johns Hopkins University.

Key Management Personnel (IV.h), Cont.

Asma Ali, Ph.D.: Subject Matter Specialist – Human Services [PROPRIETARY]



Dr. Ali is a social scientist with over 15 years of experience leading and conducting research, high stakes testing, and analytical projects in the public interest. She has led projects across all phases of the research cycle, including research design, operational planning, implementation, analysis, and reporting/dissemination phases. A post-doctoral trained systems-based researcher, Asma has overseen and conducted high-impact projects including improving veterans' health outcomes, understanding changing career pathways of laboratory professionals, conducting state-and regional education curriculum audits, optimizing youth and scientific workforce development programs, assessing medical professionalism, high stakes test development, and assessing learning outcomes. Her capabilities include managing sampling frames, creating complex data collection instruments, training and managing survey interviewers, interfacing with clients, liaising with technical and non-technical partners, and preparing client deliverables, including final datasets, documentation, and reports. Dr. Ali has experience conducting research and implementation projects in public health, health professions education, government, community economic development, K-12/higher education, and public policy industries.

Dr. Ali is an Adjunct Instructor at American University and Loyola University Chicago, teaching evaluation and learning analytics, and a long-term (8+ years) article reviewer for the Journal of Continuing Education in the Health Professions. She has advised on the development of research and evaluation curriculum for medical educators, medical program directors, learning professionals, grant writers, attorneys, and other non-research audiences. Ali is a popular speaker at healthcare and evaluation industry conferences on measurement and analytical topics.

Previous Projects

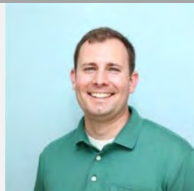
- Chicago Public Schools
- Bureau of Labor Statistics
- Duke University
- Baylor College of Medicine
- University of Illinois at Chicago
- Sinai Chicago

Education

Asma M. Ali is a social science researcher with advanced training in program evaluation and quality improvement. She received her Bachelor of Arts in Urban and Medical Sociology/Anthropology from Trinity University and her PhD in Urban Planning and Policy, with concentrations in survey research and measurement. Asma also completed post-doctoral education in Health Professions Education Evaluation and Research at the US Department of Veteran Affairs and Baylor University.

Key Management Personnel (IV.h), Cont.

Austin Ryland, Ph.D.: Subject Matter Specialist – Higher Education / Education [PROPRIETARY]



Austin Ryland is a GPS Strategy & Analytics Senior Consultant with over a decade of experience in operations research and analytics supporting leadership in federal health, DoD, State Department, and universities. His passions include higher education, STEM, and data science.

Austin has taught trainings on topics such as policy and data visualization, regression, and data mining. He has experience using national data sets to support research and policy efforts in non-profit and university settings. His data set specialties include IPEDS, WebCASPAR, FSA, NPSAS, and BPS.

Austin leverages systems level thinking and social science background to enhance efforts at the intersection of strategy and analytics. His analytic experience has emphasized quantitative methods, survey analysis, qualitative research, and mixed methods evaluation. His efforts have included accreditation, assessment, evaluation support for Evidence Act (Foreign Services Institute and Department of State (DOS) Center for Analytics).

Prior to Austin joining Deloitte, he did research analysis in higher education at institutions such as Johns Hopkins University, APLU (Association of Public and Land-grant Universities), Henry Jackson Foundation for Uniformed Services University, and ASEE (American Society for Engineering Education).

Previous Projects

- DOS Center for Analytics
- Administration of Children and Families (ACF)
- Center for Medicare and Medicaid Innovation (CMMI)
- U.S. Air Force

Education

Austin received his Bachelor of Science in Psychology from University of Central Florida and his Master of Science in Health Promotion from University of Kentucky. He received his PhD in Higher Education Administration from University of Alabama.

Key Management Personnel (IV.h), Cont.

Krista M. Crow, Ph.D.: Research Manager – Biology [PROPRIETARY]



Dr. Krista Crow is a trained scientist, passionate individual, and problem-solver. She has six years of experience in academia where she created bridges, helped others navigate challenges, and developed personalized solutions to maximize personal and professional success across public health and higher education. From her education, she brings forward knowledge and insights into public health and toxicology, life sciences, research and development, project management, content development, and curriculum development and implementation.

Krista collaborated with academics and professionals to build trust and develop positive relationships within the community. Krista aims to extend her scientific knowledge in research and public health environments to help her clients with their customer and marketing initiatives. She is passionate about developing innovations to support total health and wellbeing, especially having observed the direct link between reproductive health and the environment. She is committed to helping clients lead their best lives and solve their most critical problems.

Previous Projects

Education

Krista received her Bachelor of Science Biology / Pre-Medicine with a minor in Chemistry from Robert Morris University and her PhD in Environmental Health Science from University of Georgia. She also completed a role as a Graduate Research Assistant.

Rosalynd Mosser: Senior Research Analyst – Human Services [PROPRIETARY]



Rosalynd Mosser is a strategist with 10 years of experience working with executive leaders across all levels of government to facilitate strategic planning and implementation processes. She gets excited about the intersection between behavioral science, design thinking, and public system reform.

Before joining Deloitte, Rosalynd helped governors' offices across the country improve outcomes for children and families through policy and system reform with the National Governors Association and led national and international research projects with the Center for Advanced Hindsight and the Center for the Study of Social Policy.

Previous Projects

- National Association of State Workforce Agencies/State of North Carolina
- Duke University
- Lutheran Immigration and Refugee Service
- General Services Administration/Office of Management and Budget
- Internal Revenue Service (IRS)
- National Governors Association
- Center for the Study of Social Policy

Education

Rosalynd received her Bachelor of Arts in Philosophy, Politics and the Public from Xavier University. She received her Master of Public Policy from Duke University.

Key Management Personnel (IV.h), Cont.

Celeste Chung: Senior Research Analyst – Evaluation Services, Public Health [PROPRIETARY]



Celeste Chung is a Senior Consultant with 15 years of experience effectively collaborating with federal, state, and local government to evaluate and improve public health programs and policies, including five years in consulting. She is skilled in conducting evaluability assessments, designing, and implementing qualitative and mixed method evaluations, developing and delivering evaluation and qualitative methods trainings to practitioners, and collaborating with clients to scope and carry out their evaluation efforts.

Celeste has worked on a variety of topics, including patient navigator programs, injury prevention, chronic disease prevention, and pipeline programs to improve minority serving institutions in early-stage technology efforts.

Previous Projects

- CDC National Center for Injury Prevention and Control (NCIPC)
- CDC Achieving Public Health Impact through Research (APHIR)
- CDC Division of Global HIV & TB (DGHT)
- NASA Space Technology Mission Directorate (STMD)
- CDC National Center for Emerging and Zoonotic Infectious Diseases (NCEZID)
- CDC National Center for Chronic Disease Prevention and Health Promotion (NCCDPHP)

Education

Celeste received her Bachelor of Arts in Sociology from Beloit College. She received her Master of Social Work, Policy and Master of Public Health, Social and Behavioral Services from University of Washington - Seattle. She also received a Certificate in Maternal and Child Health from University of Washington – Seattle.

Sara Maillacheruvu: Research Analyst – Policy Analysis [PROPRIETARY]



As a recent graduate, Sara is interested in leveraging data to build efficient, effective, and equitable policy systems. She enjoys serving as a bridge between technical and non-technical stakeholders, confirming that data-driven insights are legible to all so that policymakers can make informed decisions.

Prior to joining Deloitte, she worked in local government. As a community development professional, she administered HUD grants; focused on local housing policy issues; and worked as an urban planner, concentrating on food insecurity and economic development. She also served as a Bill Emerson National Congressional Hunger Fellow (2020-2021), where she worked on federal food insecurity issues and land/agriculture policy that impacts Native American communities. As a consultant with Deloitte GPS, she looks forward to leveraging her data skills alongside her diverse policy background.


Previous Projects

Education


Sara received her Bachelor of Arts in English and Bachelor of Arts in South Asian Languages & Civilizations from University of Chicago. She received her Master of Science in Public Policy and Management – Data Analytics from Carnegie Mellon University.

Key Management Personnel (IV.h), Cont.

Sristy Acharya: Research Analyst – Human Services [PROPRIETARY]

	<p>Sristy Acharya is a Consultant within the Government and Public Services (GPS) practice in the Core Business Operations offering portfolio. She brings 3+ years of experience across government agencies with focuses on community health/outreach, epidemiology, public health policy and communication with internal and external stakeholders. Her experiences working in the field have helped her develop public health competencies such as analytic and assessments, cultural competency, community dimensions of public health, public health science, and program management.</p> <p>Sristy is passionate about observing epidemiology through a health equity lens and using biological principles to study the distribution of disease in a specific population.</p>
Previous Projects	<ul style="list-style-type: none"> Eunice Kenny Shriver National Institute of Child Health and Human Development (NICHD)
Education	<p>Sristy received her Bachelor of Arts in Biological Sciences Integrative Public Health and Nutrition from North Carolina State University. She received her Master of Public Health, Epidemiology from George Washington University.</p>

Melissa Taylor: Research Analyst – Education [PROPRIETARY]

	<p>Melissa Taylor is a Consultant within GPS Risk and Financial Advisory's Regulatory Compliance & Operational Risk practice. She currently provides Project Management support for the Regulatory and Legal Support Business Strategy Activation. In this capacity, Melissa tracks investments, facilitates business case submissions, and oversees communications for the Offering Portfolio. Additionally, Melissa provides embedded strategy support to a federal law enforcement agency, as well as Advisory Consultant work for the Department of State Smart Ports Initiative.</p> <p>Prior to Deloitte, Melissa was a Social Studies Instructional Designer in North Texas for 8 years. During her tenure, Melissa was awarded several grants for international education cross-cooperation, where she worked directly with education agencies and schools in Latin America, East Asia, and the Middle East.</p>
Previous Projects	<ul style="list-style-type: none"> USAID Georgia Green Transport and Logistics Department of State IDO Europe Eurasia BD
Education	<p>Melissa received her Bachelor of Arts in History and Bachelor of Arts in English from University of North Texas. She received her Master of Arts in International Relations and Diplomacy.</p>

Key Management Personnel (IV.h), Cont.

Ashleigh Williams: Research Analyst – Biology [PROPRIETARY]



Ashleigh Williams is a GPS Strategy & Analytics Consultant focused on program planning/implementation, stakeholder engagement, public health communication and improving and innovating public sector health care to solve and strengthen community and national health outcomes. She is a strong, supportive leader with over five years of experience driving positive outcomes in the public health sector in the fields of program management, Community Based Participatory Research (CBPR), strategic communications and planning, Adolescent health, STD/STI Prevention, systems thinking, quality assurance (QA), and technical writing.

Her interest includes Black Maternal Mortality/Health, Women's Health, Underserved and Underrepresented communities, Adolescent Health, STD/STI Prevention, Gender Equity, Diversity and Inclusion, and Health Equity. She also comes with experiences in biomedical research and has a passion for advocacy for multiple marginalized communities.

Previous Projects

- National Institutes of Health National Institute of Child Health and Human Development (NIH NICHD)
- Department of Defense (DoD)
- Veterans Health Administration
- Centers for Medicare and Medicaid Services (CMS)

Education

Ashleigh received her Bachelor of Science Biology and her Master of Public Health from Morgan State University.

Hannah Rudolph: Research Analyst – Biology [PROPRIETARY]



Hannah Rudolph is a consultant in the Digital Health market offering within Deloitte's Government and Public Services Practice. She graduated from Colgate University with a degree in Biology. Hannah has a strong interest in innovative life sciences, public health and healthcare analytic method. Prior to Deloitte, Hannah has years of experience working within scientific labs. This experience helped to develop an overall understanding of laboratory and hospital environments and prepared her to work within the healthcare field.

Previous Projects

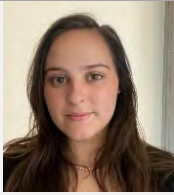
- CDC, National Center for Emerging and Zoonotic Infectious Diseases
- Veterans Health Administration
- IRS

Education

Hannah received her Bachelor of Arts in Biology from Colgate University. She also completed roles as a Clinical Lab Assistant and Research Assistant.

Key Management Personnel (IV.h), Cont.

Olivia Lopez: Functional Analyst [PROPRIETARY]



Olivia Lopez is a Junior Analyst in Risk & Financial Advisory. She recently graduated from the University of Florida with an MS in Information Systems and Operations Management, specializing in Data Science.

She excels at reviewing data for anomalies and preparing it for review. She has years of experience in HR and higher education that helps her bring a personable side to a technical field. She thrives on challenges and enjoys helping others succeed.

Since joining Deloitte, she's provided internal control services related to financial reporting and third-party compliance within several industries including healthcare technology, financial services, and cybersecurity.

Previous Projects

- Empower
- Omnicell
- Fortinet

Education

Olivia received her Bachelor of Arts in Business Administration and her Master of Science in Information Systems and Operations Management- Data Science from the University of Florida.

Recent Project Sample (IV.i)

Deloitte's experienced teams of evaluation practitioners are recognized leaders who remain successful in designing and conducting evaluations not only for our clients in institutions of higher education, but also across federal, state, and local government agencies, in addition to our work within commercial and national foundation spaces. We are known for having the internal capacity to provide clients with quick turn evaluations, designing methodologies with a mixed-methods approach, and excelling in high visibility topic areas that in turn have resulted in multiple top-tier journal publications.

After scanning the QR code below, a sample work product (from the CDC Foundation Rapid School Evaluation project) will populate as an example work product. For this project, our team developed a research plan, data collection instruments/protocols, collected and analyzed qualitative and quantitative data, and shared learnings through reports (on CDC Foundation's website) and peer-reviewed articles.

Below is a summary of the work sample included with this proposal.

Project	Summary
COVID-19 Prevention Strategies in K-12 Schools: Findings from Parents, Students, Teachers and Other School Staff, March-May 2021, CDC Foundation	This research report triangulated data across several data collection methods to better understand COVID-19 prevention strategies in K-12 schools. Findings focus on individual actions and behavior of school community members, district policies, and school practices to prevent the spread of COVID-19 in K-12 settings during the 2020/2021 school year. This work assisted the CDC Foundation in helping schools across the US inform decisions around reopening and staying open safely.



Figure 3: QR Code to CDC Foundation's COVID-19 Prevention Strategies in K-12 Schools

Peer reviewed articles from this work include:

Gillani A, Dierst-Davies R, Lee S, Robin L, Li J, Glover-Kudon R, Baker K and Whitton A (2022) Teachers' dissatisfaction during the COVID-19 pandemic: Factors contributing to a desire to leave the profession. *Front. Psychol.* 13:940718. doi: 10.3389/fpsyg.2022.940718;

<https://www.frontiersin.org/articles/10.3389/fpsyg.2022.940718/full>

Hertz MF, Dierst-Davies R, Freire K, et al. Design and Implementation of an Innovative, Rapid Data-Monitoring Strategy for Public Health Emergencies: Pilot of the United States School COVID-19 Mitigation Strategies Project. *Public Health Reports.* 2023;138(6):878-884.

doi:10.1177/00333549231190050; <https://journals.sagepub.com/doi/10.1177/00333549231190050>

V.b.6. VASCUPP Member Institution Sales

[PROPRIETARY]

<u>Vendor</u>	<u>Institution</u>	<u>Amount of Sales (approximate within last 12 months)</u>
Deloitte and/or Deloitte Consulting LLP	University of Virginia	\$ 55,000.00
	George Mason University	\$ 30,000.00
	William & Mary	\$ 400,000.00

Appendix A. Past Performance, Project Details, and References

[PROPRIETARY] Detailed information on each of the six selected Past Performance Projects are provided in the tables within this section. We provide information on the project, including key activities performed, methodology used, and impact made, as well as the performance period and provide a point of contact.

Project Name	Virginia Workforce Development Transformation [PROPRIETARY]
Point-of-Contact:	George Taratsas; George.Taratsas@governor.virginia.gov; 804-572-7594
Project Description	<p>Brief description of services provided</p> <p>The Virginia workforce development system relies on a decentralized approach to decision-making. The Secretary of Labor looked to establish a new agency for workforce development to effectively align business needs for skills, capabilities, and resources to the Commonwealth's workforce. Deliverables in Phase 1 included a business case for change, legislative approach/messaging, stakeholder engagement, and statewide data and technology assessment. During the 2023 Virginia General Assembly Session, Deloitte supported the Secretary and his team as they navigated the legislative process, which resulted in nearly unanimous bipartisan support in both houses of the Virginia legislature. As a direct result of this work, the General Assembly passed legislation, which the Governor has now signed into law, that established the Virginia Department of Workforce Development and Advancement.</p> <p>Methodology:</p> <p>This project required the use of a mixed-methods approach as we conceptualized, organized and facilitated our plan to help Administration leaders reflect on priorities and restructuring a meaningful impact to workforce development efforts in the Commonwealth. Data collection included engagement with high level State leaders (i.e., 4 Cabinet Secretaries, 3 Commissioners, 9 Agency Directors, the Virginia Chief Transformation Officer, and the interim Chancellor of Virginia Community College System, among others) during which Deloitte captured their insights on challenges and opportunities to strengthen workforce development. This resulted in an opportunity for Administration leaders and stakeholders from various sectors to participate in a facilitated strategic discussion on workforce development, of which the client shared that this was the best discussion and investment of time the Commonwealth has dedicated to the subject of workforce development. Deloitte also conducted a formative assessment, landscape analysis and an economic impact evaluation that included 30 interviews, a detailed analysis of secondary key workforce data, synthesis of success stories, identification of lessons learned from peer states and produced a detailed report on the State's return on investment.</p> <p>Outcomes:</p> <p>Deloitte successfully aided the Office of the Secretary of Labor to deliver the business case for change and navigate the legislative process to establish the Virginia Department of Workforce Development and Advancement. Deloitte gathered evidence through knowledge development activities, facilitated strategic discussions, reported learnings from key stakeholders, and provided communication support.</p> <p>In the final phase of the Workforce Development Transformation, our team is providing the project governance expertise to stand up a new agency for workforce, while maintaining continuity of operations. Further, we will be working to improve the efficiency and effectiveness of the Commonwealth's workforce development programs and apply metrics to measure success.</p> <p>As a strategic partner with the client throughout the evaluation process, Deloitte delivered the business case for change – including a financial model to show both the investment needs and anticipated return on the investment. Through this effort,</p>

	Deloitte assisted the Office of the Secretary of Labor in gaining bipartisan support and institutional buy-in for strategic change.
Performance Period	10/2022 – 6/2025

Project Name	Centers for Disease Control and Prevention (CDC) Foundation Rapid School Evaluation* [PROPRIETARY]
Point-of-Contact	Alaina Whitton; awhitton@cdcfoundation.org
Project Description	<p>Brief description of service provided</p> <p>Given the widespread community transmission of COVID-19 domestically in Fall 2020, more data was needed to identify K-12 school practices that confirmed the safety of students as well as school staff and faculty. The CDC Foundation, with technical assistance from the CDC, engaged Deloitte to implement multiple data collection methods to rapidly identify (1) COVID-19 mitigation strategies being used in schools to prevent, slow, and contain its spread across the country; (2) facilitators and barriers to implementing the strategies; and (3) additional tools and resources needed to support the effective implementation of these promising strategies.</p> <p>Methodology:</p> <p>The CDC Foundation, with technical assistance from the CDC, engaged Deloitte to implement multiple data collection methods, including:</p> <ul style="list-style-type: none"> • Six cross-sectional web panel surveys of teachers, parents, and students (with over 15,000 respondents), • Nine sector-based surveys for school administrators and nurses, • 11 online focus groups to collect qualitative data collection, • social media monitoring, and • 28 crowdsourced surveys targeting hot topics impacting schools. <p>Outcomes:</p> <p>Deloitte used information collected to develop:</p> <ul style="list-style-type: none"> • Social media reports to enhance search terms for emerging trends, • Internal reports for CDC Foundation, • Three triangulation reports cleared for use on the CDC Foundation websites, • Dashboard/data exploration tool to enable CDC staff access to data for additional analysis, and • Multiple peer-reviewed articles. <p><i>* For proposed client reference, we request that JMU contact the Project Executive, Julie Beecher who will provide a client contact phone number at the time of award.</i></p>
Performance Period	9/2020- 6/2021

Project Name	Department of Veteran Affairs (VA) Women’s Health Transition Training Pilot [PROPRIETARY]
Point-of-Contact	Nancy Maher; Nancy.Maher@va.gov ; 202-384-5953
Project Description	<p>Brief description of service provided</p> <p>Deloitte was invited to support the design, development, and evaluation of a one-day health education training focused on health care resources for women veterans at VA. The committee’s intent was for this module to be available as part of the VA/DOD transition assistance program (TAP) when active duty servicewomen transition to civilian life. The program aims to confirm that women immediately take</p>

	<p>advantage of VA health care available to them upon military separation, including primary care, mental health, reproductive health, and maternity care benefits. Team members leveraged human-centered design (HCD) and adult learning industry leading practices to develop and pilot a training course, including all curriculum materials (comprehensive women’s health handbook, slide deck for the 5-hour course, trainer guide, and supplies for interactive activities) and set up the program evaluation (evaluation design, logic model, data collection tools, performance measurement plans, etc.) for the three-year-long engagement. The evaluation was a mixed-methods, utilization focused evaluation, with pre/post and intervention/control data analysis.</p> <p>Methodology:</p> <p>Active duty servicewomen were recruited via their military installations and via external stakeholder communications to attend the training. Training participants provided personal data to track their progress with VA enrollment and service utilization.</p> <ul style="list-style-type: none"> • Curriculum design: Sent survey to active duty women’s networks and social media outlets to recruit for interviews. • Evaluation: Qualitative data came from open ended survey questions, observation protocols, in-depth interviews, and focus groups. Surveys and observational notes were collected at every training. In-depth interviews and focus groups were conducted at random with participants who had attended the VA women’s health pilot, either in-person or over the phone. <p>Key research objectives:</p> <ul style="list-style-type: none"> • Identify gaps in health information for servicewomen during the transition from military to Veteran status, especially as it relates to VA women’s health services • Identify barriers to VA care • Demonstrate whether a user-centric and personalized training curriculum would motivate health behavior change. • Use ongoing data collection for course improvement • Track rates of enrollment, time to enrollment, and utilization of VA services compared to the baseline transitioning servicewoman population <p>Outcomes:</p> <ul style="list-style-type: none"> • Created a half-day curriculum using HCD and adult learning methods that resonated with participants and motivated change in perception and behavior. • Results showed an 81% increase in VA enrollment over baseline and 25% decrease in time to enrollment over baseline. • Quantitative data also showed pre/post increases in awareness of VA women’s health services, preparedness to navigate the VA health care system, and perception of VA to receive quality women’s health care services. • Qualitative results were applied to make updates to the pilot curriculum for future course implementation and provided depth and context to our findings around barriers to VA care
Performance Period	09/2017-06/2020

Project Name	Defense Health Agency (DHA) Ad Hoc Surveys and Public Opinion Polls [PROPRIETARY]
Point-of-Contact	Wanda Oka; Wanda.k.oka.civ@mail.mil; 703-681-3636
Project Description	<p>Methodology:</p> <p>This project provided additional advanced analysis on data collected regularly using an existing survey instrument. We gave a survey web link to the beneficiaries after their visit. Study design and data collection was conducted by another vendor. To analyze the survey results, the Deloitte team utilized natural language processing and machine learning techniques to analyzed more than 130,000 open-ended comments about beneficiaries' visits and the facilities where they received treatment by theme and sentiment (positive, negative, mixed, none). Leveraging NLP technology allowed for efficient analysis, providing DHA with very timely insights on beneficiary experience and concerns during the pandemic – and especially being able to distinguish concerns that were unique to the pandemic environment (vs. more systemic concerns).</p> <p>Outcomes:</p> <p>The analysis provided DHA leadership with an immediate view into the evolving needs and sentiments of the beneficiaries. Equipped with a comparison of pre-pandemic trends, DHA was able to identify ways to improve care during the pandemic, and whether it would be beneficial to implement some changes to care that were necessary because of the pandemic but ultimately popular among beneficiaries. Certain elements of service that required changes (e.g., how beneficiaries received prescriptions) were so positively received that those changes may be kept post-pandemic.</p>
Performance Period	09/2008 – Present

Project Name	Centers for Disease Control and Prevention (CDC) - 2D Barcode Scanning Project [PROPRIETARY]
Point-of-Contact:	Faisal Reza; nuf5@cdc.gov; 404-498-5399
Project Description	<p>Brief description of services provided</p> <p>Deloitte has supported CDC through multiple pilot projects, and other support, to evaluate various strategies to improve accuracy of vaccine data records and efficiencies in recording vaccine data. Across three pilots, with over 300 sites, a new technology to record vaccines (scanning of 2D barcodes on vaccines, to populate several data fields into health records) was introduced to health care providers, pharmacies, and health systems across the U.S.</p> <p>Methodology:</p> <p>Various evaluation designs (non-experimental, quasi-experimental, experimental, case studies, workflow studies) and data collection methods (survey, interviews, focus groups, observations, vaccine records) have established an evidence base around improvements to accuracy, efficiency, staff satisfaction, workflow, and organizational change. All evaluations were designed and overseen at each stage by our doctoral-level evaluators. Each pilot included an evaluation plan, used as a guiding framework for the evaluation design, sampling, data collection, analyses and reporting. Any clearances were obtained prior to data collection. Data collection instruments and related protocols were developed, pre-tested and implemented, with data collected through observations, interviews, time measurements, online</p>

	<p>user and leader surveys. De-identified vaccine records were obtained, reviewed, and properly secured.</p> <p>Outcomes:</p> <p>Multiple peer-reviewed articles, conference presentations, and user-guides (for project leads, decision-makers, technology teams) communicate findings from these projects and aid decision-making/implementation for others.</p>
Performance Period	09/31/2011- present

Project Name	Listos California Evaluation and Reporting Support [PROPRIETARY]
Point-of-Contact:	Alan Lange (Valley Vision); alan.lange@valleyvision.org ; 916-834-8305
Project Description	<p>Brief description of services provided</p> <p>In 2019 Governor Newsom launched the Listos California Campaign, a \$50M landmark effort by California Office of Emergency Services (Cal OES) to reach 1 million diverse and vulnerable Californians with emergency preparedness information. Valley Vision engaged Deloitte to assess and communicate the results of the first year of the campaign and engage community partners to plan for the campaign's future.</p> <p>Methodology:</p> <p>Deloitte helped assess the results of the campaign by collecting and analyzing relevant quantitative data, as well as distributing a survey to community-based grantees.</p> <p>Outcomes:</p> <p>Deloitte used this information to visualize key insights and outputs from Y1 and consolidate learnings to guide the future of the campaign. Deloitte also conducted stakeholder listening sessions to inform the strategy and budget request for the second year of the campaign.</p>
Performance Period	09/2020 – 03/2021

Appendix B. Resumes

1. Julie Beecher, CISA, PMP [PROPRIETARY]

Julie Beecher, CISA, PMP

Deloitte & Touche LLP

Managing Director

Summary of Experience and Qualifications

Julie Beecher is a Certified Information Systems Auditor (CISA), and Project Management Professional (PMP) with over 23 years of experience. Julie coordinates management of the Internal Audit (IA) engagements at state and local institutions and private universities and is responsible for the overall delivery of IA services. She also provides oversight to the IA project teams during overall planning, execution, workpaper review, and reporting of Deloitte's internal audit activities. She serves as the engagement Managing Director.

Additionally, she possesses the following skillsets:

- Deep client and industry knowledge gained through maintaining a longstanding relationship with client
- Extensive knowledge of risk management and compliance practices
- Experience in establishing and executing on an internal audit workplan based on the risks and needs of the client
- Extensive knowledge in IT systems and controls

2. Dillon Clark, MSSW, MBA, CFE [PROPRIETARY]

Dillon Clark, MSSW, MBA, CFE

Deloitte & Touche LLP

Manager

EXPERIENCE

Deloitte & Touche LLP; Risk and Financial Advisory

Manager, Accounting, and Internal Controls: Controls, Compliance, Finance

Senior Consultant, Internal Audit: Controls, Compliance, Finance

- Conduct program integrity reviews, and forensic reviews for various federal agencies, state, and local governments.
- Advised healthcare and higher education clients on uniformed guidance compliance, Medicare coverage analysis, clinical trial budget development, funds flow, and research strategy.
- Serve as a Subject Matter Specialist (SMS) for sponsored research and federal grant compliance and the development of operational and financial controls for the full award life cycle for various higher education, healthcare, and State and local government clients.
- Serve as SME for fund accounting and the accounting and reporting of restricted funds and sponsored research for various State governments, local governments, higher education, and healthcare clients.
- Serve as a SME for PK-12 compliance, operations, finance, and policy for various Federal agencies and State and Local accounts.
- Developed audit plans for the monitoring of research compliance and monitoring of sub-awards throughout the entire research life cycle.
- Lead the development of the go to market strategy for the financial restructuring of institutions of higher education as well as grants management, research administration, Community College and PK-12 practice areas.
- Manage the development of proposals and responses to solicitations for higher education, Federal, and healthcare opportunities.
- Assist State and Local Government clients with GASB-87 leasing standard implementation by reviewing and identifying leases and contracts and analyzing the balance sheet and financial statement impact.

Beyond Conflict, Inc.

Director of Finance and Operations

- Developed, balanced, and managed a \$6.3M organizational budget and implement financial policies and procedures, for an organization with university subsidiary labs at NYU, University of Pennsylvania, MIT, Oxford, and Yale.

- Aided in the development of targeted communications campaigns based on novel research promoting peace and decrease polarization across the globe.
- Conducted annual risk assessment and developed an internal audit plan.
- Oversaw two consecutive clean annual external audits and subsequent 990 filings.
- Developed and implemented all internal financial controls, implemented tracking systems and trained finance, development, and operations staff in areas including cash management, cash advances, employee reimbursements, currency exchange, and federal contract compliance and reporting.
- Oversaw HR functions, drafted organizational policies, and tracked and monitored compliance with federal and state laws.
- Developed and implemented the strategic vision for operational and financial growth and sustainability.
- Oversaw all contract negotiation, compliance, and implementation including financial compliance with federal grants.

Creative Minds International Public Charter School

Chief Operating Officer

- Identified and evaluated possible risks to information security and developed industry-oriented solutions, implemented new tools to mitigate risk, and drafted internal audit plans based on annual risk assessment
- Oversaw clean annual external audit and subsequent 990 filing
- Developed and managed a \$20M organizational budget
- Developed and implemented financial, operational, and IT policies to ensure 100% compliance with local and federal financial, IT, and operational regulations (e.g., Health Insurance Portability and Accountability Act (HIPAA) for three (3) publicly funded schools
- Redesigned the organizational human capital structure to decrease turnover, decrease overhead spending, and increase employee engagement and satisfaction for 150 full-time employees and 56 part-time employees
- Directly supervised a team of nine (9) and indirectly supervised 51 staff members in completing operational, financial, technology, human resources, internal audit, and program development, management, and support functions.
- Developed and implemented a robust fundraising plan and raised over \$300,000 in competitive public and private foundation grants.
- Successfully scaled operations to onboard over 100 new students and 50 new staff members in one year.
- Oversaw technology purchasing, distribution, implementation, and fleet management as well as building maintenance, operations, security, and support.

Breakthrough Montessori

Founding Chief Financial Officer

- Developed and implemented all organizational policies and procedures and maintained compliance with all regulatory and oversight bodies.
- Managed communications, advertising, external relations, and government relations to aid in organization growth and development.
- Successfully raised \$1.5M in start-up funding and aided in the development of a 5-year targeted fundraising strategy.
- Developed a strategic growth plan and implemented operational procedures to allow organizational growth.
- Managed the full GL cycle including maintaining the organization's bookkeeping records according to GAAP, overseeing the monthly, quarterly, and annual close process, preparing and presenting financial statements, and overseeing clean annual financial and regulatory audits for two consecutive years
- Balanced and prepared annual budgets for presentation to the Executive Director, the Finance Committee of the Board, and the Board of Directors.
- Selected, implemented, and managed compliance for all employee benefits programs including health, dental, vision, short- and long-term disability, and 401k program.
- Conducted an annual review of state and federal financial, IT, HR, and data compliance standards and analyzed and presented potential risks to the Board of Trustees and the District of Columbia Government

in open and closed hearings and subsequently developed technology-based systems and controls to mitigate risk and collect ongoing data for periodic analysis.

LEADERSHIP EXPERIENCE AND BOARD MEMBERSHIPS

- **President**, City of Los Angeles, Central San Pedro Neighborhood Council
- **Treasurer**, MeWe International – 2018 – Present
- **Commissioner**, D.C. Juvenile Justice Advisory Group (Mayoral Appointment) - 2015 -2018
- **Commissioner**, Montgomery County Commission on Landlord-Tenant Affairs (County Executive Appointment) - 2014-2016

CERTIFICATIONS

- **Association of Certified Fraud Examiners – Certified Fraud Examiner (CFE)**
- **National Association of University Research Administrators – Post Award Accounting Certificate**

CONFERENCE PRESENTATIONS

- Association of College and University Auditors (ACUA), AuditCon, 2023, “NSPM 33 Compliance and Controls”
- The Society of Research Administrators International, Annual Conference, 2023, “Research Administration and Internal Audit: A Partnership to Promote Compliance and Reduce Risk”
- Association of College and University Auditors (ACUA), Webinar, August 2024, “NSPM 33 Compliance and Controls”

EDUCATION

Quantic School of Business and Technology

Master of Business Administration

Columbia University in the City of New York

Master of Science Social Enterprise Administration (MSW)

The Catholic University of America

Bachelor of Arts

3. Hope Gilbert, Ph.D., MSSW [PROPRIETARY]

S. Hope Gilbert, Ph.D., MSSW

Deloitte Consulting LLP

Manager

Summary of Experience and Qualifications

Dr. Gilbert is a Manager at Deloitte Consulting and has more than 20 years of experience in public health and program evaluation, while supporting federal and state contracts. In her role at Deloitte, she currently serves as a senior healthcare/public health evaluation specialist among Deloitte’s Evaluation for Research for Action program evaluation professionals and is also a member of Deloitte’s Suicide Prevention Solution Team. She is recognized for leading program evaluation teams with her strong record of evaluation experience as an epidemiologist, public health specialist, and strategic methodologist.

Program Evaluation Experience

Deloitte Consulting, Manager

Centers for Disease Control and Prevention (CDC)

July 2023 - Present

Experience Duration: 4 months **Role:** Manager

- Dr. Gilbert engages with senior CDC clients to identify gaps in the Injury Center’s research priority areas and outstanding needs for subject matter experts establishing new research priority areas and revising existing priority areas.
- Led a Deloitte team in developing a robust evaluation plan to guide future next steps for Injury and Violence Prevention.

Previous Relevant Project Experience

Center for Research Evaluation, Principal Evaluation Associate (former Senior Evaluation Associate and Evaluation Associate)

National Institutes of Health*December 2017 – July 2023***Experience Duration:** 5.5 years **Role:** Co-Principal Investigator

- Dr. Gilbert was responsible for all project activities focused on clinical and translational research, including the workforce development of junior investigators across five Mississippi higher education institutions including the state's only level-1 trauma center.
- Led teams in the development of over 50 mixed-methods data collection protocols using REDCap, Qualtrics, and KNACK with over 30 data collection activities occurring annually.
- Areas of interest for reporting included impact, outstanding needs, workforce capacity, behavior change, knowledge gained, productivity, and barriers incurred.

National Institutes of Health*December 2017 – July 2023***Experience Duration:** 2 years **Role:** Principal Investigator

- Dr. Gilbert led an evaluation team of public health specialists, evaluators, and statisticians in a mixed-methods approach to gauge the impact COVID-19 messaging.
- This large-scale effort included the design of a mixed-methods approach across 12 unique projects while working with over 20 client stakeholders and managing their individual evaluation needs to address a collective funding agency objective.
- Led her team to identify goals matched to five evaluation questions focused of progress, fidelity and quality, workforce experiences, barriers and supports, and impact.

Office of Women's Health*December 2017 – July 2023***Experience Duration:** 1 year **Role:** Principal Investigator

- Dr. Gilbert led a team of evaluators in designing a mixed-methods approach to evaluate the credible, reliable, and actionable data on this OWH initiative to support her client's interests in ongoing learning, adaptation, and improvement; this effort also targeted diversity and equity in a healthcare model targeting pregnant and postpartum women.
- She led a team in the development of four specific key aims to guide the evaluation plan that mapped to four key questions targeting the outcome evaluation techniques of fidelity, experiences, barriers and supports, and impact.
- This effort was another large-scale project with high visibility for the OWH and included the development of 10 innovative data collection protocols and outreach tracking systems.

Health Resources and Services Administration*December 2017 – July 2023***Experience Duration:** 1 year **Role:** Principal Investigator

- Dr. Gilbert led an evaluation team in the development of a mixed-methods approach targeting increased mental health support for rural Appalachian territories while increasing the diversity of the nursing workforce by recruiting and supporting students and faculty from diverse populations, including those from disadvantaged backgrounds and underrepresented racial and ethnic minorities.
- She worked with her team to guide client stakeholders in the development of six program objectives that led to the identification of key outcome domains of education, practice, and retention and six key evaluation activities.

SAMHSA*December 2017 – July 2023***Experience Duration:** 1.5 years **Role:** Principal Investigator

- Dr. Gilbert managed an evaluation team of public health specialists to evaluate four key objectives of a SAMHSA project designed to train Mississippi educators in the targeted identification of students in mental health crisis.
- She designed a mixed-methods approach used to collect primary data from the workforce of Mississippi educators, to gauge their capacity for implementation, and to track their use of targeted lessons learned. In addition, she was tasked with working with the community leaders to evaluate the impact on rural communities and the youth served.

Department of Defense*December 2017 – July 2023***Experience Duration:** 2 years **Role:** Senior Evaluator and Project Manager

- Dr. Gilbert served as the key evaluator for this Department of Defense project during the height of COVID focused on workforce development among large-scale DoD contractors in Mississippi.

- She led a team of analysts in the design of four mixed-methods data collection protocols to review existing Mississippi manufacturing-related training programs and feedback on processes, procedures and developed curricula. In addition, Dr Gilbert worked with a healthcare economist on the design of an economic impact analysis to learn about defense industry spending during COVID.

Defense Center of Excellence

May 2015 – December 2017

Experience Duration: 2 years fulltime, 5 years contracting **Role:** Senior Consultant and Subject Matter Specialist

- Dr. Gilbert led more than 25 teams of MHS analysts and public health specialists to CONUS and OCONUS Military Treatment Facilities with PTSD and TBI clinics to evaluate their policies, protocols, and patient treatment plans. She also guided teams through detailed workforce development trainings to improve customer service and accurately identify areas for development opportunities.
- Led a team of Military Health System analysts and public health specialists in mixed-methods data collection efforts, analysis of quantitative and qualitative data, synthesis of findings, development of client deliverables, and delivery of senior DCoE client briefings.

Department of Defense

May 2005 – May 2015

Experience Duration: 9 years **Role:** Senior Epidemiologist/Biostatistician

- Responsible for annual Military Health System reports for Active Duty and Non-Active Duty Service Members covered by TRICARE.
- Led teams of public health specialists, biostatisticians and SAS analysts in data collection, analyses and synthesis of findings using inferential, associational, predictive, prescriptive, and causal statistical approaches.
- During her engagement with this work for over nine years, Dr. Gilbert led research teams in the following areas of interest for the Department of Defense while also preparing final deliverables and serving as the senior team member for client briefings: mental health disorders, cervical cancer, prenatal care, prehypertension, neonatal continuity of care between institution transfers, opioid use, sleep apnea, impact of influenza on chronic diseases, post-traumatic stress disorder, emergency room continuity of care, consistency of healthcare administrative and inpatient record coding, patient safety for inpatient hospitalizations, drug use and abuse, and HIV/AIDS among at-risk populations and their access to quality healthcare and treatment programs.

Employment History

- Deloitte Consulting LLP (2023 – Present)
- Center for Research Evaluation (2017-2023)
- Engility Corp/SAIC (2015-2022)
- Lockheed Martin Information Technology (2005 – 2015)
- The Johns Hopkins Medical Institutions (2000 – 2005)

Education

- The Johns Hopkins Bloomberg School of Public Health, Ph.D., Psychiatric Epidemiology
- University of Tennessee Medical Center, MSSW, Clinical Science and Social Work
- University of Mississippi, B.S., Biology

Memberships

- Research to Policy Advisor for the United States Congressional Offices, Current Appointment
- Military Suicide Research Consortium, Current Appointment
- American Evaluation Association, Member
- American Evaluation Association, Former Program Chair for the Use and Influence TIG
- Professional Association of Social Workers in HIV/AIDS, Member

Proficiencies

- STATA, Qualtrics, REDCap, EXCEL, SmartSheet, Canva

Select Publications

- Mason, S., Ragan, M., **Gilbert, S.**, & Lent, S.A. (2023). Social determinants of mental health: Implications for measurement, research, evaluation. *Journal of Counseling & Development*, invited special issue.

- Kugler, J., **Gilbert, S.H.**, Forman-Hoffman, V.L., Kelly, J.H., Scott, M.J., Hahn, C., Lounsbery, D., Trivedi, M., Barger, E., Class, M.M., Forrest, L.J. (2008, September). Evaluation of Influenza Immunization Rates: Enrolled Beneficiaries with Diagnosed Asthma, Heart Failure, and/or Acute Myocardial Infarction. MHSCQM.
- Carr, V.F., **Gilbert, S.H.**, Forrest, L., Fraser, J., Kelly, J. (Accepted December 2007). Prehypertension and Hypertension in the Military Health System.
- Solomon, M.G., **Gilbert, S.H.**, Nichols, J., Chaffee, R.H.B. (In Press February 2007). Evaluation of the May 2005 Mobilization: Programs to Increase Seat Belt Use. U.S. Department of Transportation. Washington, DC.
- **Gilbert, H.**, Forrest, L., Fraser, J., Kelly, J., Norris, K., Chin, S., Dickey, W., Ingersoll, S., Thomas, P. (2005, August). The Association of Prehypertension with the Development of Subsequent Hypertension. National Quality Management Program.
- Fraser, J., Forrest, L., Ingersoll, S., Kelly, J., Herres, K., **Gilbert, H.**, Dickey, W. (2005, August). Military Health System (MHS) Clinical Practice Guideline (CPG) Implementation Evaluation Phase I – Questionnaire Development. National Quality Management Program.
- Tobin, K.E., Tang, A.M., **Gilbert, S.H.**, Latkin, C.A. (2004). Correlates of HIV Antibody Testing among a sample of Injection Drug Users: The Role of Social and Contextual Factors. AIDS and Behavior.
- Latkin, C.A., Tobin, K.A., **Gilbert, S.** (2003). Shun or support: The role of religious behaviors and HIV related health care among drug users in Baltimore, Maryland. AIDS and Behavior, 6(4):321-329.
- William W. Eaton, Anjene Musick Addington, Judith Bass, Valerie Forman, **Stephanie Gilbert**, Kathleen Hayden, Michelle Mielke. Risk Factors for Major Mental Disorders: A Review of the Epidemiologic Literature. Baltimore, Department of Mental Hygiene, Bloomberg School of Public Health, Johns Hopkins University, November 2002, <http://www.jhu.edu/~janthony/share/Envirome/Envirome-I.dbf>

4. Asma Ali, Ph.D. [PROPRIETARY]

Asma Ali, Ph.D.

Deloitte Consulting LLP

Specialist-Master / Manager

OVERVIEW

Highly knowledgeable, skilled, and experienced cross-sector applied research and evaluation specialist and consultant. Experience managing and conducting applied research, survey research, marketing research and program evaluation across the research life cycle. Possesses valuable transferable skills in consulting and research arenas. Excellent leadership skills and verbal and written communication skills. Strong track record of designing, conducting, and managing mixed- methods studies in healthcare, education, and workforce development. Demonstrated ability to meet needs of diverse clientele, ranging from CEOs to community activists. Leadership experience as a manager, directing multiple studies at once and overseeing budgets, and supervising and mentoring staff. Effective working independently as well as collaboratively in team environments to deliver exceptional quality to cross-sector clients.

EXPERIENCE

Deloitte Consulting LLP

Chicago, IL

Specialist-Master/ Manager

2022-Present

- Serve as survey research SMS on national and international government, nonprofit, and higher-education studies.
- Manage (survey, current state assessments, and DEI) research and statistical modeling projects across full-research cycle from proposal development to development of reports and final deliverables.
- Manage diversity, equity, and inclusion assessments and analysis for public sector clients
- Current Industries served: Pharmaceutical Consortium, Emergency Management, Transportation, Drug Enforcement, International Development/ Health

Michael E. DeBakey V.A. Medical Center

Houston, TX

Health Professions Educational Fellow

2020-Present

- Facilitate change in healthcare quality via national and local program implementation and evaluation, curriculum development and design, educational innovation, and research.
- Design evaluation plans (surveys, focus groups, interviews) for multi-site national and international healthcare education.
- Utilize implementation, training, and developmental evaluation frameworks (RE-AIM, PRISM, CFIR, Kirkpatrick, Patton etc.) to inform program development and outcomes.
- Develop conceptual frameworks and tools (i.e., surveys, training curricula) for assessing health professions education, professional development, and patient experience outcomes.
- Prepared executive briefings and summary documents on research projects.

A.A. & Associates, LLC

Chicago, IL

Founder and Principal Consultant

2017-Present

- Lead and conduct program development and evaluation/applied research projects, specializing in culturally responsive and equity-focused evaluations.
- Utilize mixed-method research and survey design principles to support organizational learning and planning.
- Develop and lead workshops and graduate-level courses on outcomes/impact measurement and strategic planning.
- Recent engagements include Northwestern University, BECOME Inc., Illinois Alliance for Continuing Medical Education, Infectious Diseases Society of America, Umoja Student Development Corporation, and The AIDS Foundation of Chicago.

American Society for Clinical Pathology

Chicago, IL

Director of Evaluation, Measurement, and Assessment

2012-2017

- Established the Evaluation, Measurement, and Assessment department, defining department goals and objectives. Trained and hired 3 new staff members. Supervised 6 direct and 18 indirect reports.
- Created, deployed, and analyzed large scale surveys to assess learning, workforce development, and clinical outcomes. Increased survey response rates 65%.
- Developed and facilitated workshops on research and evaluation topics for internal and external executives, scientists, and physicians. Decreased examination development and survey item editing and revision time by 25%.
- As lead grant writer, won 90% of Federal and industry submissions totaling \$8M.

University of Illinois at Chicago

Chicago, IL

Research Specialist/Graduate Instructor

2004-2011

- Facilitated collaboration between the community and university institutes to ensure project requirements and relationship were developed and completed to meet funder requirements.
- Managed research projects and conducted research tasks and activities, leading external meetings, defining research parameters, and conducting quantitative, qualitative, and geospatial data collection and analysis.
- Performed needs assessment for a community foundation project to support revision in giving guidelines.
- Researched and designed an outreach program for a suburban independent living center.
- Identified data management needs and created technical database specifications for coalition of immigrant/ refugee agencies.

Learning Point Associates

Chicago, IL

Research Associate

2003-2006

- Developed, trained interviewers, and analyzed state curriculum assessment surveys and audit protocols for a five-state region.

NORC at University of Chicago

Chicago, IL

Survey Specialist

1998-2001

- Inter-department liaison for survey development and fielding for large scale and national surveys.
- Worked on the General Social Survey, National Longitudinal Survey of Youth, and City of Chicago Youth Workforce Study.

COURSES TAUGHT & DESIGNED

University Courses:

- Culturally Responsive Evaluation Theory
- Quantitative & Qualitative Methods
- Instructional Design and Learning Analytics

Professional Development:

- Question Writing for Assessment Exams
- Design Thinking for Culturally Responsive Evaluation
- Evaluating Training Program

SELECTED PUBLICATIONS

- Shah F, Sells J, Wirthman J, Abraham C, **Ali AM**, and Calloway-Lane C. (Accepted for Publication). Measuring Employee Whole Health: An Analysis of Three Department of Veteran Affairs Sites. Global Advances in Medicine and Health. Sage P.
- **Ali AM**, Horstman MJ, Nguyen A, Mendez AM, Shahin JS, Godwin, KM. (Under Review). Virtually Engaged: Lessons Learned from the VA Quality Scholars Summer Institute.
- Chen, P, Christie, IM, Godwin, KM, Helmer, D (Under Review). Using Qualitative Data for Quality Improvement.
- Haspel RL, **Ali AM**, Huang GC, Smith MH, Atkinson JB, Chabot-Richards DS, Elliott RM, Kaul KL, Powell SZ, Rao A, Rinder HM, Vanderbilt CM, Wilcox R. (2019). Teaching Genomic Pathology: Translating Team-Based Learning to a Virtual Environment Using Computer-Based Simulation. Arch Pathol Lab Med.
- Robinson J, **Ali AM**, Clark J, Soles RM, Ritter D. (2018). Changing Practice Patterns for Cytotechnologists: A Comparative Analysis from the 2009 and 2015 ASCP BOC Practice Analysis Surveys. Lab Medicine.
- Garcia E, Kundu, I, **Ali AM**, Soles RM. (2018). The American Society for Clinical Pathology's 2016-2017 Vacancy Survey of Medical Laboratories in the United States. Am J Clin Path.
- **Ali A**, Parks E, Bogie M, Rabin D, Panday S. (August 2016) Learning Scaffolds: Progressive Instructional Design for Problem-Based Learning. J Cont Educ Health Prof.
- Woljiak KS, Goolsby C, Choi S, **Ali A**, Serdy N, Stetler-Stevenson M. (2017) Report of the International Clinical Cytometry Society and American Society for Clinical Pathology workload survey of clinical flow cytometry laboratories. Cytometry Part B.
- Haspel RL, **Ali AM**, Huang G. (2016). Educational innovation: Using a team-based learning approach at national meetings to teach residents genomic pathology. J of Grad Med Ed.
- Haspel RL, Rinder HM, Frank KM, Wagner J, **Ali AM**, Fisher PB, Parks ER. (2014). The State of resident training in genomic pathology: a comprehensive analysis utilizing the RISE. Am J Clin Pathol.
- Gómez RL, **Ali AM**, Casillas W. (2014). Mentorship and the professional development of culturally responsive evaluators in the American Evaluation Association's Graduate Education Diversity Internship (GEDI) program. In P. M. Collins & R. Hopson (Eds.), Building a new generation of culturally responsive evaluators through AEA's Graduate Education Diversity Internship program. New Dir Eval.
- Suarez Y, Balcazar F, Taylor-Ritzler T, **Ali A**, Hasnain R. (2013). Race, Class, and Disability: A Social Justice Dilemma. Reinventing Race, Reinventing Racism. Betancur J. and Herring C, Eds. London, Brill P.
- Gonzales A, Ramasubramanian L, **Ali A**, Eichelkraut A. (2005). Organizing Partnerships for Sustainable Community Economic Development: Lessons Learned from the University of Illinois-Chicago Neighborhoods Initiative. J Higher Ed Outreach and Engagement

SELECT VOLUNTEER & COMMUNITY EXPERIENCE

- Chicagoland Evaluation Association, President (2016- 2021)
- CREA-CEA Scholarship Review Committee, CREA (2021)
- Diversity, Equity, and Inclusion National Workgroup, AEA (2021-24)
- TIG Scan National Workgroup. AEA Workgroup (2020-2021)
- Reviewer, Journal of Continuing Education in the Health Professions [JCeHP], 2015-present

EDUCATION

Post-doctoral Fellowship Training, Michael E. DeBakey V.A. Medical Center Houston, TX

- Advanced Fellowship in Health Professions Education Evaluation and Research, V.A. Office of Academic Affiliations,

Doctor of Philosophy, Urban Planning and Policy, University of Illinois at Chicago Chicago, IL

- Concentration in Community Economic Development and Education Research Methods.
- Dissertation: Stirring the Melting Pot: Case Studies of Nonprofit Organization Responsiveness to Racial Community Change
- Certificate: Measurement, Evaluation, Statistics, and Assessment Program

Master of Arts in Sociology, Loyola University Chicago Chicago, IL

- Concentration in Urban and Medical Sociology

Bachelor of Arts in Sociology, Trinity University San Antonio, TX

HONORS & AWARDS

- American Board of Medical Specialties, Visiting Scholars Program (2021-)
- LEEAD Scholars Program, (2017-8), Annie E. Casey Foundation, Evaluation Mentor
- “Best Live C.E. Award” (2017), Alliance for Continuing Education in the Health Professions (ACeHP) Annual Meeting.
- “Best in Class Outcomes Award”- Honorable Mention, (2015), ACeHP Industry Conference.
- Orange Award (2013), American Society for Clinical Psychology for outstanding collaboration (awarded 2x)
- American Evaluation Association Graduate Education Diversity Initiative program participant (2008-2009)
- Best Community Action Research Paper, (2004) Fannie Mae Foundation, Associated Collegiate Schools of Planning

ADDITIONAL

- Skilled in multivariate and quantitative analysis, qualitative, and geospatial analysis
- Software Proficiency: SPSS, SAS, Atlas, NVivo, Dedoose, Tableau, RedCAP, Qualtrics, ArcGIS
- Native Fluency (Reading, Writing, Speaking): English and Hindi/Urdu
- Personal Interests: Non-Profit volunteer, Design thinking in research, Mentoring, and “old” Bollywood movies

5. Austin Ryland, Ph.D. [PROPRIETARY]

Austin Ryland, Ph.D.

Deloitte Consulting LLP

Senior Consultant

Summary of Experience:

- A decade of operations research & analytics supporting leadership in federal health, DoD, State Department, & universities.
- Efforts have included accreditation, assessment, evaluation support for Evidence Act (Foreign Services Institute & DOS Center for Analytics).
- Leverage systems level thinking and social science background to enhance efforts at the intersection of strategy & analytics.
- Analytics experience includes quantitative methods, survey analysis, and mixed methods evaluation.
- My background has emphasized human capital, and projects that align with this typically fit well.
- Project management style is person-centered, grounded in educational background in psychology & counseling. My style is to empower team members to grow within their level while offering guidance, support, and boundaries in a collaborative, respectful manner. My approach is often to put the team and client objectives at the forefront of efforts while being mindful of individual development needs and articulated individual goals for team members. I do allow plenty of space for independent performance.
- Heavy Guardian, heavy Integrator. This business chemistry lends itself well towards a style, even industries & projects, with equity, respect, and semi-structured/structured approaches.
- Secret clearance through DoD good for 10 years starting 2/2021.

Deloitte Experience

My Deloitte experience includes 9 months federal health with ACF and CMMI (usability testing, Tableau dashboards, developing state rankings relating to health equity) and 8 months supporting Department of State Center for Analytics. With DOS, this includes 4 months on a Quick Response Team providing proof of concept analytics solutions in 30 days (Google Data Studio dashboard and data collection, Statistics forecasting in response

to Congressional mandates), 1 month reviewing equity indexes in support of policy & operations efforts, and 3 months as a team lead identifying indicators for global resource allocating and vetting via focus groups with SME's across strategic priority areas. Have mentored Analysts and Consultants as well as operated independently.

Industry: GPS **Sector:** DSJ-Air Force

Sr. Consultant

Deloitte GPS Consulting

Arlington, VA

11/2022 – present

IT BAO Workstream Lead

Lead a team of three (two Consultants) with business analytics helping the Air Force track spending for IT. Collaborate with DAF and civilian contractors to provide reporting and SEM support for analytics within the CIO's office. Includes project management, collaboration with stakeholders across the Air Force, with an emphasis on Chief Data and AI Office, as well as Office of Studies and Analysis, and even UX and CIO Strategy Metrics. Setup project documentation to emphasize a sense of engagement and independence with stakeholders across the DAF in related areas.

Technical Environment: Tableau Desktop & Server, Envision (Palantir)

Industry: GPS **Sector:** Civil -Department of State

Sr. Consultant

Deloitte GPS Consulting

Arlington, VA

3/4/22 – 10/28/22

Data Scientist for Department of State Center for Analytics

Support Quick Response Team with rapid analytics responses. Includes using simple linear forecasting, developing workable solutions in Excel, dashboards in Google Data Studio, use of Google Suite of Products for analytics purposes. Draft data sharing agreements while adhering to Congressional requests for data. Synthesize legislative documents regarding the use of select data elements. Collaborate with CFA SME's, promote use of tools and innovative features such as Tableau, Qualtrics, Python. Perform social science research on equity, inclusive of rubric development and evaluation of data source and metric quality. Perform research on indicators for global presence across strategic modernization priority areas. Mentor Analysts and Consultants.

Technical Environment: Excel, Google Data Studio, Google Suite (Forms, Sheets), Python-Anaconda Jupyter Notebooks for data validation

Industry: GPS **Sector:** HHS

Sr. Consultant

Deloitte GPS Consulting

Arlington, VA

9/20/2021-3/1/22

Role: SC in Measurement & Analysis Team for CMS LAN

Support measurement efforts related to increasing value-based, population health for LAN (healthcare payment learning and action network) while supporting CMMI (Center for Medicare & Medicaid Innovation). High level support for survey focuses on APM's (Alternative Payment Methods). Efforts have included using secondary data to develop ranking system for states relative to dimensions of opportunity to address health equity as well as willingness and capacity to implement innovations to increase population health. Used Tableau Prep to review historical listserv data for LAN members across 5 years to visualize aspects of stakeholder engagement and participation.

Technical Environment: Excel, Tableau Desktop, Tableau Prep

Industry: GPS **Sector:** HHS

Sr. Consultant

Deloitte GPS Consulting

Arlington, VA

6/2021-8/6/2021

Role: SC in Information Management Team, Washington, DC

Support ongoing analytics efforts for child resettlement. Objectives are to stabilize and transition client (ORR) to managing and leveraging their analytics efforts after Deloitte's support for emergency-level emphasis on supporting resettlement efforts. Wrote SOP's and provided guidance on communicating data requests in a

strategic manner with federal HHS leadership. Fulfilled data requests and provided basic projections in Excel.
Technical Environment: Excel, Tableau Server

Prior Experience

Industry: Government Sector: Civil Government

Evaluation Data Analyst

GAP Solutions for Foreign Services Institute

Arlington, VA

9/2020-4/2021

Role:

Advise industry leading practices in analytics for evaluation. Emphasis on implementing Qualtrics survey software on enterprise level from central office. Support Office of Educational Policy with Evaluation team in analytics role. Provide guidance on tool development for Future of FSI-how courses will be offered (online, F2F, hybrid). Lead with Qualtrics while collaborating with Qualtrics enterprise team.

Technical Environment: Qualtrics, FedRAMP environment

Industry: Other Sector: Higher Education

Senior Institutional Research Analyst

Johns Hopkins University College of Arts & Sciences

Baltimore, MD

11/2018-3/2020

Role:

Presented with minimal data infrastructure, collaborated with IT to automate reporting resulting in significant reduction in data request turnaround, allowing time for analysis. Daily use of Tableau Desktop for reporting and data visualizations. Functional areas included policy reviews, self-studies, board of trustees reporting. Collaborated with offices such as assessment, IT, institutional research, and auditing. Developed partnerships with library for bibliometrics analysis.

Technical Environment: Qualtrics, Tableau, SQL database extraction

Industry: Government Sector: Higher Education

Institutional Research Analyst

Henry Jackson Foundation for Uniformed Services University

Bethesda, MD

11/2017-11/2018

Role:

Enhanced Strategy and Accreditation to collect data for Balanced Scorecard. Presented strategic metrics for school leadership (nursing deans), daily collaboration with associate deans. Supported Manpower for School of Medicine on three-month detail. Supported School of Nursing with accreditation process for CCNE (Commission on Collegiate Nursing Education).

Technical Environment: Spider Strategic Management System, Google Suite

Industry: Other Sector: Higher Education

Senior Research Associate

ASEE (American Society for Engineering Education)

Washington, D.C.

3/2016-11/2017

Role:

Opportunity to be PI resulted developing evaluation plan while collaborating with research team. Provided mentoring for junior research associates for professional development. Technical report writing for proprietary data for external distribution. Designed evaluation plan as part of grant to host a conference focusing on Impact worth \$360K. Project Director and co-PI for a workshop worth \$50K which helped to broaden participation in engineering for traditionally underrepresented professionals. Created short data narratives (Databytes) through internal annual surveys on engineering higher education data for flagship magazine publications.

Technical Environment: MaxQDA, R Programming Language, Qualtrics

Industry: Financial Services

Sector: Banking & Capital Markets

Data Analyst

Apex Systems for EJP Capital LLC (Contract)

Arlington, VA

2/2016-3/2016

Role:

Facilitated data validation for customer-facing data warehouse. Reconciled data for customer accounts as liaison between IT and Accounting.

Technical Environment: Custom data warehouse created by SQL programmers

Industry: Other Sector: Higher Education

Higher Education Subject Matter Expert (Remote Contract), Kresge Foundation

Detroit, MI

12/2015-1/2016

Role:

Used IPEDS to collect, analyze, and communicate data for ongoing infographic.

Technical Environment: IPEDS Database: Integrated Postsecondary Data System

Industry: Other Sector: Higher Education

Assistant Director, Research & Analysis

APLU (Association of Public and Land-grant Universities)

Washington, DC

5/2014 – 9/2015

Role:

Served as a resource for higher education data for end users for data requests, grant proposals, infographics and APLU institution member information. Audited data elements for external publications across the organization.

Technical Environment: IPEDS Database: Integrated Postsecondary Data System, National Science Foundation Secondary Data Surveys/Systems, SPSS

Industry: Other Sector: Higher Education

Graduate Assistant Positions at the University of Alabama

Tuscaloosa, AL

8/2010-12/2013

Graduate Research Assistant, College of Education Office of Research and Service

5/2013 -12/2013

Role: Supported Dean with emphasis on faculty activity reporting as well as grant trends.

Graduate Research Assistant, Higher Education Administration Program

8/2012 – 5/2013

Role: Provided foundational database for future survey data as part of a project focusing on redesigning teaching methods in STEM fields at a community college.

Graduate Research Assistant, Higher Education Administration Program

8/2011 – 5/2012

Role: Designed and administered student satisfaction survey to higher education administration students.

Graduate Assistant, Student Affairs Office of Assessment & Planning

8/2010 – 7/2011

Role: Supported unit through design and delivery of surveys & reports using Qualtrics. Developed training resources.

Technical Environment: IPEDS Database: Integrated Postsecondary Data System, National Science Foundation Secondary Data Surveys/Systems, SPSS, Qualtrics

System Experience**1. Software Products:**

- 1.1. SPSS Statistical Package for Social Sciences (Intermediate)
- 1.2. Qualtrics Survey Software & Dashboards (Intermediate)
- 1.3. SAS Enterprise Guide Miner (Training-16-week course audit)
- 1.4. HLM Using Lisrel 9.1 (Training)
- 1.5. Tableau (Intermediate User), enhanced with Training
- 1.6. Qlik (Training)
- 1.7. PowerBI (Training)
- 1.8. MaxQDA (Qualitative Analysis Software) (Intermediate)

2. Development Tools:

- 2.1. Python through Anaconda (Spyder & Jupyter Notebooks) (Beginner)
 - 2.1.1. K-Means, Pandas, Scikit-learn

- 2.1.2. AI Guild Explorer Program (Coursework completed 1/7/22)
- 2.2. SQL (Coursera- SQL for Data Science Course 1)(Beginner)
- 2.3. R Programming Software for Statistics (Training using RStudio & Multivariate Statistics)(Beginner-project experience for propensity score matching)
- 2.4. Github (Beginner)
- 3. **Hardware:** N/A
- 4. **Middleware:** N/A
- 5. **General Tools:**
 - 5.1. Microsoft Office

Education

Ph.D., Higher Education Administration	2010-2013
University of Alabama, Tuscaloosa, AL	
M.S. Health Promotion	2007-2008
University of Kentucky, Lexington, KY	
B.S. Psychology	2001-2004
University of Central Florida, Orlando, FL	

Professional Certifications/Affiliations

Have emphasized institutional research, higher education, and teaching & learning. Full historical list available in longer resume.

Training

University Coursework:

- Program Evaluation I
- ANOVA
- Regression Methods in Education
- Quantitative Research Methods
- Independent Study Survey Methods
- SAS Data Mining I (audit)
- HLM using Lisrel 9.1

MOOCs & Self-study:

- Coursera- SQL for Data Science Course 1
- Coursera - Programming for Everybody (Python)
- Multivariate Statistics (self-study)
- Deloitte AI Guild Explorer Program (AI Guild Explorer Program Completed January 2022)
- Deloitte AI Guild Trustworthy AI Program (current-finish August 2022)
- Audited Trustworthy AI training course, July-August 2022 through Deloitte.

Professional Development:

- Newcomer's Workshop, SAIR (Southern Association for Institutional Research) 2012 Annual Conference, Orlando, FL
- ASHE (Association for the Study of Higher Education) Graduate Student Policy Seminar (November, 2013), St. Louis, MO
- AERA (American Educational Research Association), annual meeting professional development course, *An Introduction to Hierarchical Linear Modeling for Education Researchers*, Chicago, IL, April 2015
- AIR (Association for Institutional Research) annual meeting professional development course, *Tableau Bootcamp*, Denver, CO, May 2015
- Graduate Student Grant Writing Seminar conducted by David G. Bauer. Training workshop highlighted facets of *The "How To" Grants Manual, 6th Edition: Successful Grantseeking Techniques for Obtaining Public and Private Grants*. University of Alabama College of Education Office of Research & Service, Tuscaloosa, AL, Fall 2013

Publications

Journal article:

Ryland, A. (2013). Worked Examples: Teacher Practices. International HETL Review, 3(8).
Available at <https://www.hetl.org/worked-examples-teacher-practices/>

Reports:

Yoder, B. & **Ryland, A.** (2016) TAACCCT II Evaluation. University of the District of Columbia
Community College Transportation Academy.

American Society for Engineering Education. (2017). Transforming Undergraduate
Education in Engineering Phase II: Insights from Tomorrow's Engineers.
Retrieved from:

<https://www.asee.org/documents/publications/reports/2017TUEEPPhase2.pdf>

American Society for Engineering Education. (2017). Transforming Undergraduate Education in
Engineering Phase

III: Voices on Women's Participation and Retention.

Retrieved from:

<https://www.asee.org/documents/publications/reports/2017TUEEPPhase3.pdf>

Databytes:

As part of the ASEE AEIR (Assessment, Evaluation, and Institutional Research Office) data would be mined from the internal Profiles survey for publication in the magazine PRISM. I was databytes lead from April 2016-November 2017, with each PRISM publication, roughly 9 per year. Collaboration with ASEE Art department and lead PRISM publisher was also part of the process. Select Databytes available in longer resume.

6. Krista M. Crow, Ph.D. [PROPRIETARY]

Krista M. Crow, Ph.D.

Deloitte Consulting LLP

Consultant

Summary of Experience and Qualifications

Dr. Krista Crow is a trained scientist, passionate individual, and problem-solver. She has six years of experience in academia where she created bridges, helped others navigate challenges, and developed personalized solutions to maximize personal and professional success across public health and higher education. From her education, she brings forward knowledge and insights into public health and toxicology, life sciences, research and development, project management, content development, and curriculum development and implementation. Krista collaborated with academics and professionals to build trust and develop positive relationships within the community. Krista aims to extend her scientific knowledge in research and public health environments to help her clients with their customer and marketing initiatives. She is passionate about developing innovations to support total health and wellbeing, especially having observed the direct link between reproductive health and the environment. She is committed to helping clients lead their best lives and solve their most critical problems. She received her Ph.D. in Environmental Health Science from the University of Georgia and a B.S. in Biology and minor in Chemistry from Robert Morris University.

Deloitte Experience

Industry: Government & Public Services Service Area: Cross-Consulting Group

Offering Portfolio: Customer & Marketing

Consultant

August 2023- Present

Previous Experience

Stronger Business Summit

Athens, Georgia

Community Ambassador

May 2022 - October 2022

- **Problem Solving.** Addressed questions and concerns regarding identifying our customers, engagement, and attendance to the summit.

- **Communications.** Discussed questions and collaborated with c-suite executives, managers, and employees at local nonprofits and businesses to build trust and develop positive relationships within the community.
- **Industry Leading Practices.** Documented and developed customer-reports, goals, benchmarks, and current and future marketing strategies
- **Marketing Plan Improvement.** Developed and implemented promotional strategies for the Stronger Business Summit and identified opportunities for marketing and future business collaborations.

Technical Environment: Customer and Marketing

The University of Georgia, College of Public Health

Athens, Georgia

Graduate Teaching Assistant

August 2007 – May 2021

- **Instruction.** Instructed 350+ undergraduate students in eight different courses during the pursuit of doctoral degree.
- **Curriculum Development and Implementation.** Developed and implemented three undergraduate courses as the instructor of record.
 - **Lectured on Topics:** exposome, blood, preparation for a career in graduate school, dissertation research, environmental health science topics, and careers in environmental health.
 - **Courses:** EHSC 2100: Environmental Health Physiology, EHSC 4350L: Environmental Chemistry Lab, EHSC 4910: Environmental Health Science Senior Seminar, EHSC 2020: Orientation to Environmental Health Science, EHSC 3060: Introduction to Environmental Health Science,
- **Collaboration.** Collaborated with the UGA Career Center to ensure students had the skills to embark on their individual careers.
- **Career Development.** Created 20 individual career plans for the Environmental Health students.

Technical Environment: Higher Education, Public Health

The University of Georgia, College of Public Health

Athens, Georgia

Graduate Research Assistant

August 2017 – July 2023

- **Project Design, Development, and Management.** Managed a multifaceted toxicology research project, resulting in the development of two national and international collaborations. Developed a new lab technique and collected preliminary data enabling \$100k in grant funding and reproducible results.
- **Research Analysis.** Executed molecular and cell biology research, which resulted in several publications book chapters, and poster and oral presentations at national scientific conferences.
- **Data Analysis.** Performed extensive literature reviews of primary literature and online databases to formulate and test hypotheses. Interpreted results and brain-stormed future directions of the work.
- **Teamwork.** Collaborated with various departments at the University of Georgia, University of Pittsburgh, and Zagreb School of Medicine to identify the effects of medication-exposed human and non-human primate reproductive cells. Helped the lab transition from a small start-up with 3 graduate students to 7 full-time lab members in less than 4 years. Assisted in securing \$3.4 million in grant award funds (highest-funded lab within the Environmental Health Science department) and the Principal Investigator (Dr. Charles Easley IV) with earning tenure promotion within 5 years.
- **Lab Member Scientific Discussions.** Provided graduate and undergraduate scientists with detailed explanations concerning background information and scientific methodology. The students proceeded with a better understanding of scientific principles employed to enhance their scholastic success.
- **Project Troubleshooting.** Performed experimental troubleshooting and product recommendation to optimize mine and the laboratory's research.
- **Mentoring and Training.** Trained 20 grad students, post-docs, and physician-scientists in stem cell research, mentored 4 undergraduates to acceptance to MD programs, and onboarded 4 graduate student coworkers.

Technical Environment: Higher Education, Public Health, Life Sciences

Monaca Turners Gymnastics

Monaca, Pennsylvania

Athletic Coach

January 2010 – June 2017

- **Athletic Coaching.** Coached gymnasts through seven successful seasons by cultivating a strong work ethic, demonstrating drive and passion, and teaching athletes to have pride in themselves and each other.
- **Developed Strategic Training Programs.** Enhanced individual athletic performance by creating individual strategic training programs with a common goal of successful seasons.
- **Mentoring.** Mentored young women and men from diverse backgrounds to prepare for competition and adult situations.

Education

Doctor of Philosophy, Environmental Health Science

University of Georgia, College of Public Health

GPA: 3.94/ 4.0

Dissertation: Fast Relief, Future Consequences: Assessing the impact of over-the-counter medications on male reproductive health. Awards:

- Orlin Kenyon Fletcher, Jr. Scholarship (\$5,000) – 2020
- Awarded 5 European Academy of Andrology Continuing Education Credits – 2019
- University of Georgia Graduate School Student Travel Award (\$1,300) – 2019
- University of Georgia School of Public Health Travel Award (\$500) – 2019
- University of Georgia Global Education Travel Award (\$1,000) – 2019
- University of Georgia Regenerative Bioscience Center Travel Grant (\$100) – 2019
- University of Georgia Outstanding Teaching Assistant Award – 2019
- Male Contraceptive Initiative Travel Grant (\$1,000) – 2018

Bachelor of Science, Biology/ Pre-Medicine, Minor: Chemistry

Robert Morris University

Graduated cum laude

Awards:

- Massey Scholarship (\$1,085) – 2016
- PA State Grant (\$3,255) – 2016
- Hearst Scholarship (\$1,500) – 2015- 2016
- Women of Achievement Award – 2014
- Dean's Scholar Award – 2014- 2016
- Justice Scholarship (\$24,000 total) – 2012- 2016
- Dean's List – all 8 semesters from 2012- 2016

Publications

Peer-Reviewed Publications

- Katherine W. Greeson, **Krista M.S. Crow**, R. Clayton Edenfield, and Charles A. Easley IV. (2023) Inheritance of paternal lifestyles and exposures through sperm DNA methylation. *Nature Reviews Urology*.
- Rose Schrott, Katherine W. Greeson, Dillon King, **Krista M. Symosko Crow**, Charles A. Easley IV, Susan K. Murphy. (2022) Cannabis alters DNA methylation at maternally imprinted and autism candidate genes in spermatogenic cells, *Systems Biology in Reproductive Medicine*.
- Khairallah Atwi, Sarah N. Wilson, Arnab Mondal, R. Clayton Edenfield, **Krista M. Symosko Crow**, Omar El Hajj, Charles Perrie, Chase K. Glenn, Charles A. Easley, Hitesh Handa, Rawad Saleh. (2021) Differential response of human lung epithelial cells to particulate matter in fresh and photochemically aged biomass-burning smoke, *Atmospheric Environment*.
- Khampang S, Cho IK, Punyawai K, Gill B, Langmo JN, Nath S, Greeson KW, **Symosko KM**, Fowler KL, Tian S, Statz JP, Steves AN, Parnpai R, White MA, Hennebold JD, Orwig KE, Simerly CR, Schatten G, Easley IV CA. (2021) Blastocyst Development after Fertilization with in vitro Spermatids Derived from Non-Human Primate Embryonic Stem Cells, *F&S Science*.
- **K.M. Symosko Crow**, K. Watkins Greeson, J.N. Langmo, C.A. Easley IV. Investigating the Effects of NSAIDs on Human Spermatogenesis Using a Stem Cell-Based Model. In: *2021 Annual Meeting Abstract Supplement*, Society of Toxicology, 2021. Abstract no. 2727
- Katherine Watkins Greeson, Kristen L. Fowler, Paige M. Estave, S. Kate Thompson, Chelsea Wagner, R. Clayton Edenfield, **Krista M. Symosko**, Alyse N. Steves, Elizabeth M. Marder, Metrecia L. Terrell, Hillary

Barton, Michael H. Koval, Michele Marcus, Charles A. Easley IV. (2020). Detrimental Effects of Flame Retardant, PBB153, Exposure on Sperm and Future Generations. Scientific Reports.

- Ranked in the 97th percentile of almost 300,000 similarly aged articles and awarded Paper of the Month for July 2020 by National Institute of Environmental Health Science
- Abstracts published in: 2020, 2021 Annual Meeting Abstract Supplement, Society of Toxicology. Abstract no. 1289 & 2334
- Lawson, E.R, **Symosko, K.M**, Greeson, K.W, Cary, C.M, Easley IV, C.A. Glyphosate's Role in the Male Fertility Epidemic and Its Effect on Spermatogenesis. In: 2020 Annual Meeting Abstract Supplement, Society of Toxicology, 2020. Abstract no. 1567
- **Krista M. Symosko**, Katherine Watkins, E. Rose Lawson, In Ki Cho, Anthony W.S. Chan, Charles A. Easley. (2019). A novel in vitro fluorescent reporter platform for identifying male contraceptives. Fertility and Sterility.

Book Chapters

- Shuo Xiao, **Krista M. Symosko**, Charles A. Easley IV. (2022) Reproductive and Developmental Toxicity: Toxic Effects on the Female and Male Reproductive Tracts and Offspring. In: Roberts SM., James RC., Williams PL. (eds) Principles of Toxicology: Environmental and Industrial Applications. Wiley. LCNN 2021060413
- **Symosko K.M.**, Schatten G., Easley C.A. (2022) Gamete Production from Stem Cells. In: Grynberg M., Patrizio P (eds) Female and Male Fertility Preservation. Springer.

Leadership & Professional Development

The University of Georgia, The Environmental Health Science Graduate Student Association

Athens, Georgia

President

August 2021 - May 2022

- **Teamwork.** Cultivated a community that supported graduate students by organizing professional development and networking events.
- **Communications.** Selected by the departmental leadership to collaborate with the Dean of the College of Public Health and the Student Advisory Committee to advocate for graduate students.
- **Industry Leading Practices & Budgeting.** Documented and maintained the organization's standings with the University of Georgia and increased our annual budget by 33.3% from the College of Public Health.
- **Marketing Material Development.** Designed and distributed a monthly newsletter to faculty, staff, and graduate students in the department.

Technical Environment: Higher Education

The Global Women in STEM Leadership Summit

Atlanta, Georgia

Participant

August 2022

- **Professional Development.** Strengthened leadership skills focused on verbal and nonverbal communication, servant leadership, customer discovery, and authenticity in preparation for management & executive level leadership positions. Developed leadership skills focused on effective time management and energy, communication, and emotional intelligence.
- Received a \$600 scholarship from the University of Georgia Innovation District to attend.

Technical Environment: Professional Development

Women's Entrepreneurship for Graduate Student Scholar

Atlanta, Georgia

Participant

August 2022

Introduction: An innovation bootcamp program tailored to aspiring female, graduate students in the STEM field designed to teach to the basics of commercialization and targeted skill-building.

- **Customer Discovery.** Planned and conducted analysis interviews related to customer discovery for a proposed healthcare consulting firm.

Technical Environment: Customer & Marketing, Entrepreneurship, Innovation

Presentations

Abstracts for Conference Poster Presentations

- **Krista M. Symosko Crow**, R. Clayton Edenfield, In Ki Cho, Kristen Fowler Easley, James S. McClellan, Michael Koval, Charles A. Easley IV. "Investigating the Effects of NSAIDs on the Blood-Testis Barrier Using a Non-human Primate Sertoli Cell-Based Model." (2022)
 - Presented at the University of Georgia's Environmental Health Sciences Graduate Student Showcase, Athens, Georgia – 2022
 - Presented at the University of Georgia's Regenerative Bioscience – Animal and Dairy Science Symposium, Athens, Georgia – 2022
- **Krista M. Symosko Crow**, Katherine Watkins Greeson, Jacqueline N. Langmo, Charles A. Easley IV. "Investigating the Effects of NSAIDs on Human Spermatogenesis Using a Stem Cell-Based Model." (2021)
 - Presented at the University of Georgia's Environmental Health Sciences Graduate Student Showcase, Athens, Georgia – 2021
 - Presented at the Society of Toxicology (SOT) Annual Meeting, Virtual Conference – 2021
- **Krista M. Symosko**, Katherine Watkins Greeson, E. Rose Lawson, Jin-Jing Yang, In Ki Cho, Anthony W.S. Chan, Charles A. Easley IV. "A Novel in vitro Fluorescent Reporter Platform for Identifying Male Contraceptives." (2019)
 - Presented at the University of Georgia's Environmental Health Sciences Graduate Student Showcase, Athens, Georgia – 2020
 - Presented at the American Society for Reproductive Medicine (ASRM) Scientific Congress & Expo, Philadelphia, Pennsylvania – 2019
- Katherine Watkins Greeson, Kristen L. Fowler, Paige M. Estave, S. Kate Thompson, Chelsea Wagner, R. Clayton Edenfield, **Krista M. Symosko**, Alyse N. Steves, Elizabeth M. Marder, Metrecia L. Terrell, Hillary Barton, Michael H. Koval, Michele Marcus, Charles A. Easley IV. "Detrimental Effects of Flame Retardant, PBB153, Exposure on Sperm and Future Generations." (2020)
 - Presented by Katherine Watkins Greeson at the University of Georgia's Environmental Health Sciences Graduate Student Showcase, Athens, Georgia – 2019, 2020, 2021
 - Presented by Katherine Watkins Greeson at the Society of Toxicology (SOT) Annual Meeting– 2020, 2021
 - Presented by Katherine Watkins Greeson at the Regenerative Medicine Workshop- Synergizing Science, Engineering, and Clinical Translation, Charleston, South Carolina – 2019
 - Presented by Katherine Watkins Greeson at the University of Georgia's Regenerative Bioscience – Animal and Dairy Science Symposium, Athens, Georgia – 2019
 - Presented by Katherine Watkins Greeson at the University of Georgia's 10th Annual Developmental Biology Alliance Spring Retreat (Poster & Oral Seminar Presentation), Athens, Georgia – 2019
- **Krista M. Symosko**, Katherine A. Watkins, E. Rose Lawson, Jin-Jing Yang, In Ki Cho, Anthony W.S. Chan, Charles A. Easley IV. "An in vitro Screening Model for Male Contraceptives." (2018)
 - Presented at the University of Georgia's Environmental Health Sciences Graduate Student Showcase, Athens, Georgia – 2018, 2019
 - Presented at the Regenerative Medicine Workshop- Synergizing Science, Engineering, and Clinical Translation, Charleston, South Carolina – 2019
 - Presented at the University of Georgia's Regenerative Bioscience – Animal and Dairy Science Symposium, Athens, Georgia – 2019

Invited Oral Presentations

- The Environmental Health Science Departmental Seminar, University of Georgia, Athens, Georgia, 2020
 - Presented a virtual meeting titled, "Reproductive toxicity assessment of over-the-counter analgesics by utilizing an in vitro human spermatogenesis model" to ~ 30 participants
- The Regenerative Bioscience Center (RBC) Research Collective, University of Georgia, Athens, Georgia, 2020
 - Presented a virtual meeting titled, "The Development of a Novel in vitro Fluorescent Reporter Platform for Identifying Potential Male Contraceptives" to ~ 30 participants
- Round Table Discussion Leader, American Society for Reproductive Medicine, University of Georgia, Denver, Colorado, 2018

- Lead an oral discussion titled: “Modeling Paternal Transgenerational Health Concerns in a Dish”
- Guest Lecturer, EHSC 3060: Introduction to Environmental Health Science, University of Georgia, Athens, Georgia, 2017 & 2018
 - Presented two seminars titled: “The Road to Graduate School” in 2018 and “My Journey to Graduate School” in 2017 to Dr. Anne Marie Zimeri’s EHSC 3060 class

System Experience

Software/ Products

GraphPad Prism- Project experience. Adobe Photoshop- Project Experience.

UseGalaxy.org- Project Experience.

Language:

R- Training Only.

7. Rosalynd Mosser [PROPRIETARY]

Rosalynd Mosser

Deloitte Consulting LLP

Senior Consultant

Summary of Experience and Qualifications

Rosalynd is a strategist with 10 years of experience working with executive leaders across all levels of government to facilitate strategic planning and implementation processes. She gets excited about the intersection between behavioral science, design thinking, and public system reform. Before joining Deloitte, Rosalynd helped governors’ offices across the country improve outcomes for children and families through policy and system reform with the National Governors Association and led national and international research projects with the Center for Advanced Hindsight and the Center for the Study of Social Policy.

Rosalynd holds a master’s degree in public policy from Duke University and a bachelor’s degree in philosophy and economics from Xavier University.

Deloitte Experience

Industry: Government and Public Sector Service Area: Human Capital

Service Line: Organization Transformation

Manager (acting); 3 months

National Association of State Workforce Agencies/State of North Carolina

Role:

- Led a team of practitioners in developing behaviorally-informed revisions to unemployment insurance (UI) communications for the state of North Carolina
- Planned and facilitated a series of focus groups and usability tests with past and present UI claimants to understand pain points and behavioral barriers in the UI claims application process
- Developed a comprehensive evaluation plan to evaluate messaging revisions on claimant comprehension and intent to comply with message guidance

Technical Environment: Microsoft Word, Microsoft PowerPoint, Microsoft Excel, Stata, NVivo

Industry: Government and Public Sector Service Area: Human Capital

Service Line: Organization Transformation

Senior Consultant; 18 months

General Services Administration/Office of Management and Budget

Role:

- Analyzed past and current government-wide performance efforts to create a 4-year strategic vision for the incoming Biden-Harris Administration, resulting in 3 critical focus areas: Workforce, Customer Experience, and Business of Government
- Created a governance framework to secure leadership decision-making and cross-agency support for each priority area
- Redesigned the PMA reporting process to streamline internal updates to White House and Agency leadership and external public updates via performance.gov
- Managed leaders across the Workforce Priority, representing 9 different agencies, to deliver 10 government-wide goal statements and 28 success metrics

- Coordinated the Workforce Priority implementation strategy across 4 strategies & 15 workstreams to deliver government-wide progress

Technical Environment: Microsoft Excel, Microsoft PowerPoint

Industry: Government Sector: Civil Government

Offering Portfolio: Strategy and Analytics Offering: Strategy

Senior Consultant; 3 months

Internal Revenue Service

In anticipation of \$10 billion dollars of modernization funding, Deloitte furthered the development of the IRS IT Modernization Initiative Portfolio. Deloitte collaborated with the Deputy Chief Information Officer and key IRS IT stakeholders to redefine how IRS IT views modernization efforts and to implement organization transformation activities to successfully modernize IT systems and operations.

Role:

- Lead a team to plan and facilitate client strategy workshops to identify strategic priorities for the IT modernization portfolio and build consensus across business operating divisions
- Facilitate bi-weekly client meetings to define and prioritize program groupings in anticipation of \$10 billion in funding from Congress
- Synthesize outcomes from client meetings to contribute to overall IT modernization portfolio

Technical Environment: Microsoft Excel, Microsoft PowerPoint

Previous Experience

Industry: Government Sector: State, Local, and Higher Ed

Offering Portfolio: Strategy and Analytics Offering: Strategy

Senior Policy Analyst; 27 months.

Policy Analyst; 18 months.

National Governors Association

Role:

- Provided technical assistance to governors' offices and state leaders on evidence-based and promising practices related to social safety net programs
- Led a 22-state learning collaborative, including facilitating strategic planning and implementation processes as well as weekly cross-state meetings for executive-level state leaders
- Conducted research and developed memoranda to assist state leaders in making policy decisions, including drafting executive orders and state legislation
- Planned and facilitated multiple cross-state convenings, including developing multi-day convening agendas, planning sessions and preparing speakers, and facilitating panel discussions

Technical Environment: Microsoft Word, Microsoft Excel, Microsoft PowerPoint

Industry: Government Sector: State, Local, and Higher Ed

Offering Portfolio: Strategy and Analytics Offering: Strategy

Project Manager; 5 months.

Research Assistant; 4 months.

Center for Advanced Hindsight at Duke University

Role:

- Led a team of university researchers in designing and implementing and a field experiment to apply behavioral insights to improve teleworking experiences in several large metropolitan areas in multiple countries
- Evaluated program data using statistical software and summarized findings for publication
- Conducted literature reviews to assist in experiment design

Technical Environment: Stata, Microsoft Word, Microsoft Excel

Industry: Government Sector: State, Local, and Higher Ed

Offering Portfolio: Strategy and Analytics Offering: Strategy

Policy Analyst; 12 months.

Policy and Research Assistant; 12 months.

Center for the Study of Social Policy

Role:

- Drafted policy briefs and reports for publication on promising practices related to promoting child and family well-being and improving family economic stability
- Conducted original research on rules, regulations (e.g., HIPAA), and policy and program outcomes related to child welfare and juvenile justice
- Translated research into program guidance, white papers, issue briefs, federal comments, and impact assessment tools

Technical Environment: Microsoft Word, Microsoft Excel, Microsoft PowerPoint

Industry: Government Sector: Federal Health

Offering Portfolio: Strategy and Analytics Offering: Strategy

Policy Advocate; 22 months.

Lutheran Immigration and Refugee Service

Role:

- Tracked, researched and analyzed legislation related to refugee resettlement, human trafficking, immigrant detention, and unaccompanied migrant children
- Communicated and advanced the agency's legislative agenda through education of congressional offices, federal agencies, and constituents
- Developed content for press statements, testimonies to Congress, publications, and regular newsletters to constituents

Technical Environment: Microsoft Word, Microsoft PowerPoint, Wordpress

System Experience

Software / Products: Stata: Professional settings; Tableau: Classroom Experience

General Tools: Microsoft Excel, Microsoft Word, Microsoft Power Point: Expert

Education

Master of Public Policy

Duke University

Bachelor of Arts, Philosophy, Politics and the Public Cum Laude

Xavier University

Publications

- **Mosser, R.** (2021). Behavioral insights to increase WIC engagement through SNAP and Medicaid referrals in Gaston County, NC. Durham, NC: Duke University. (Master's thesis).
- Sherlock, J., Rosica, D., Clark, J., Corbin, J., Bonick, J., Rayburn-Reeves, B., Daly, M., Gavin, L., Bartz, A., Desai, A., Gangolli, S., & **Mosser, R.** (2021). Behavioral Science in Practice: Helping Local Governments Navigate COVID-19 through Multidisciplinary Collaboration. Durham, NC: Center for Advanced Hindsight at Duke University.
- **Mosser, R.** & Williams-Mbengue, N. (2019). Reforming child welfare through a three-branch approach: A toolkit for success. Washington, DC: NGA and NCSL.
- Martin, M., **Erney (Mosser), R.**, Citrin, A., & Reeves, R. (2016). 20 Years of TANF: Opportunities to better support families facing multiple barriers. Washington, DC: Center for the Study of Social Policy.

Foreign Language Skills

- French - Basic Conversation

8. Celeste Chung [PROPRIETARY]

Celeste Chung

Deloitte Consulting LLP

Senior Consultant

Summary of Experience and Qualifications

Celeste is a Senior Consultant with 15 years of experience effectively collaborating with federal, state, and local government to evaluate and improve public health programs and policies, including 5 years in consulting. She is skilled in conducting evaluability assessments, designing and implementing qualitative and mixed method

evaluations, developing and delivering evaluation and qualitative methods trainings to practitioners, and collaborating with clients to scope and carry out their evaluation efforts. Celeste has worked on a variety of topics, including patient navigator programs, injury prevention, chronic disease prevention, and pipeline programs to improve minority serving institutions in early stage technology efforts. She earned her MSW/MPH from the University of Washington – Seattle.

DELOITTE EXPERIENCE

Industry: Government and Public Services Sector: Federal Health

Offering Portfolio: Human Capital Offering: Organization Transformation

Senior Consultant; June 2021-present

CDC, NCIPC, Office of Science, Senior Consultant, 1.5 months

- Conducted a client meeting to understand the vision and scope for the evaluation of the Injury Center's research priorities and a brief literature review to identify best practices and examples of research portfolio evaluations.
- Developed a draft evaluation plan to help the Injury Center explore an evaluation of their research priorities portfolio. The draft evaluation plan suggested a tiered approach (e.g., evaluating short-term outcomes such as journal articles published, medium-term outcomes such as translation of research into action, and long-term outcomes using a landscape analysis) to accommodate the complexity and resource constraints of evaluating a research portfolio.
- Identified and presented recommendations to the client to encourage further refinement of the evaluation plan.

NASA, Space Technology Mission Directorate (STMD), Senior Consultant, 5 months

- Lead a two person team in identifying evaluation needs, designing evaluations, and implementing evaluations in support of STMDs Annual Evaluation Plans (AEP) for 2023 and 2024.
- Developed a project charter in collaboration with leadership to clarify the scope and deliverables of the statement of work and interviewed practitioners for an open role.
- Developed and managed project plans and timelines and routinely communicated project status and progress to the client.
- Conducted an evaluability assessment to understand what projects and programs were most ready and feasible to evaluate for their 2023 AEP. This included holding conversations with multiple staff members to understand their programs evaluation needs, creating evaluation selection criteria to help the client narrow down an evaluation topic, and leading conversations to scope the evaluation.
- Designed an evaluation plan and data collection tools for a pipeline program that helps Minority Serving Institutions (MSIs) better partner with small businesses to compete for NASA funding that advances innovative technology.
- Implemented the MSI evaluation, which included conducting 23 interviews with MSIs and small businesses, creating a codebook, and conducting a content analysis of interview data.
- Trained a team member in qualitative methods, with a focus on data collection and coding. Assigned the team member data cleaning and coding tasks, reviewed the tasks, and provided timely feedback.
- Developed a comprehensive evaluation report that triangulated quantitative and qualitative data to share key findings, insights, and recommendations with the client.
- In the process of developing the scope for the 2024 AEP and a third evaluation on identifying bias in awards.

CDC, NCEZID, Division of Preparedness and Emerging Infections, Senior Consultant, 4 months

- Co-developed two user guides to support the rollout of a new Salesforce grants management platform, which are used by 64 funded state and local health departments and by the client and their partner programs.
- Developed training scripts on the new Salesforce grants management platform, which were delivered to the client and 64 funded recipients via virtual and live trainings.
- Reviewed and provided feedback on user guide content, training scripts, and training videos developed by team members.

- Conducted white glove reviews of the user guides and trainings scripts prior to finalizing for use by the client, their partners, and their awardees.

APHIR II: Mega Deal, Senior Consultant, 6 months

- Co-developed the “Practitioner Guide to Qualitative Methods,” which provides Deloitte practitioners with best practices and recommendations for conducting qualitative client projects from start to finish. The guide builds internal capacity to use qualitative methods for client projects.
- Developed an “Evaluation Data Party Guide,” to support Deloitte practitioners in the development and implementation of data parties as part of a Notice of Funding Opportunity (NOFO) strategy lab. This guide provides practical steps to plan a data party, design data visualizations and facilitation activities, and use findings to inform the NOFO strategy lab.
- Led a three person team in the prioritization and development of three evaluation tools to build internal evaluation capacity, strengthen support for clients, and enhance Deloitte’s brand around research and evaluation in preparation for bidding on the APHIR II funding mechanism.

CDC, NCCDPHP, Division of Diabetes Translation (DDT), Senior Consultant, 11 months

- Led a seven person team in the implementation of a national evaluations to assess the impact of diabetes prevention and management programs across 51 state health departments across the U.S.
- Led a five person team in the development and implementation of an assessment of four emerging practices – bi-directional e-referrals, community health workers, telehealth, and unique partnerships – to improve diabetes prevention and management across 21 state, local, and county health departments across the U.S.
- Managed project plans; communicated project status updates and progress to clients on a bi-weekly and monthly basis; assigned tasks to team members based on skills, interests, and project need; and reviewed deliverables developed by team members.
- Designed interview guides for emerging practices case studies and state health department case studies.
- Conducted interviews with 9 diabetes programs and 4 group interviews with state and county health departments and their partners.
- Trained team members on qualitative methods, including conducting interviews and report writing for case studies.
- Conducted a qualitative analysis of the diabetes program interviews to identify successes, challenges, and lessons learned, which were used to develop a comprehensive report on diabetes programs.
- Conducted a qualitative analysis of state, county, and local health department interviews to identify emerging innovative practices, including successes, challenges, and lessons learned. This data was used to develop four emerging practices briefs.
- Cleaned and analyzed performance measures for 51 recipients funded under one cooperative agreement.
- Provided guidance on secondary data analysis (e.g., recipient annual evaluation reports, annual performance reports, and annual workplans), timelines, and development of deliverables.

CDC, CGH, DGHT, Science Integrity Branch, Senior Consultant, 10 months

- Developed virtual self-service training presentations to help country Associate Director Science (ADS) offices with developing and clearing scientific publications.
- Delivered virtual trainings on the CDC eClearance publications system to eight country ADS offices.
- Created tools, such as an ADS curriculum overview, to help improve communication with country ADS offices and to improve capacity for scientific activities among the offices.
- Coordinated and developed marketing materials and templates for the ADS annual science portfolio review, which is completed by 40 country offices.

Industry: Government and Public Services Sector: Federal Health

Offering Portfolio: Human Capital Offering: Organization Transformation

Consultant; September 2018-May 2021

CDC, NCCDPHP, Division of Diabetes Translation (DDT), Team Lead, 3 months

- Led a six person team in the development of two annual evaluation reports, 72 recipient profiles highlighting cooperative agreement progress, and 14 strategy profiles summarizing recipient progress in the first year of funding.

- Developed qualitative codebooks to aide in the analysis of recipient workplans, annual progress reports, and annual evaluation reports.
- Analyzed qualitative data using NVivo and developed summary findings and descriptive statistics.
- Wrote an annual summary report for diabetes prevention and an annual summary report for diabetes management, which triangulated qualitative and quantitative data sources to demonstrate progress, successes, challenges, and opportunities in the first year of funding for each program area.

CDC, NCCDPHP, Division of Diabetes Translation (DDT), Consultant, 1 year, 9 months

- Developed qualitative codebooks to aide in the analysis of recipient workplans, annual progress reports, and annual evaluation reports.
- Conducted an analysis of annual progress reports.
- Developed content for recipient profiles that highlight successes from each funding year.
- Reviewed performance measure data for 72 recipients to identify potential issues and errors in the data that could affect data analysis, shared potential data errors and issues with the client, and cleaned the data based on client feedback.

CDC; NCCDPHP; Division of Physical Activity, Nutrition, and Obesity; Consultant 3 months

- Provided evaluation technical assistance to state health departments (SHD) and community-based organizations (CBO) funded through the division's HOP, SPAN, and REACH funding opportunities.
- Reviewed SHD and CBO performance measures in the Awards Management Platform (AMP) to assess alignment between data collection methods and DNPAO's performance measure guidance.
- Recommended ways for SHDs and CBOs to better align their performance measure data collection methods with DNPAO guidance.
- Connected SHDs and CBOs with subject matter experts on physical activity, nutrition, early childhood education, and community-clinical linkages.
- Analyzed SHD and CBO evaluation reports from the first year of the funding opportunities and identifying common facilitators and barriers to implementing evaluation activities.

CDC, NCCDPHP, Division of Oral Health, Consultant, 5 months

- Served as an evaluation subject matter expert.
- Analyzed five years of qualitative data to identify successes, challenges, and CDC support needed for 21 state oral health.
- Assisted in the development and refinement of a codebook to carry out the qualitative analysis.
- Conducted key informant interviews with state oral health departments to identify facilitators and barriers to implementing oral health activities.
- Reviewed final summary report and provided recommendations from a public health and evaluation perspective.

PREVIOUS EXPERIENCE

Industry: Government Sector: Federal Health

Public Health Analyst; 1 year

Centers for Disease Control and Prevention - National Center for Chronic Disease Prevention and Health Promotion

Evaluation of a five-year funding opportunity to prevent and reduce chronic diseases and their associated risk factors in US jurisdictions in the Pacific and Caribbean.

Role:

- Led the evaluation of funded programs to prevent and reduce chronic diseases and their associated risk factors in US jurisdictions in the Pacific and Caribbean, which included:
 - Creating an evaluation reporting template to help awardees demonstrate their program's progress, success, and impacts at the end of the five-year cooperative agreement.
 - Providing technical assistance during site visits and by email and phone on revising and implementing evaluation plans, collecting data, and completing a final evaluation report.
 - Compiling, analyzing, and utilizing performance measure data to document awardee progress, improve the performance measure data collection process, and demonstrate progress made during the cooperative agreement.

- Collecting data on chronic disease self-management program implementation and participation in the Pacific.
- Led the development of a logic model, strategies, activities, performance measures, and evaluation design for a new cooperative agreement.
- Prepared an OMB package, including developing data collection materials, for a chronic disease self-management evaluation in the Pacific Islands.
- Managed the final evaluation of a chronic disease community health cooperative agreement, including reviewing and providing feedback on contractor deliverables, representing CDC interests in the development of a final evaluation and final performance measure report, and developing final evaluation products for dissemination.

Industry: Government Sector: Federal Health

Evaluation Fellow; 2 years

Centers for Disease Control and Prevention - National Center for Chronic Disease Prevention and Health Promotion

Evaluation of a five-year funding opportunity to prevent and reduce chronic diseases and their associated risk factors in US jurisdictions in the Pacific and Caribbean.

Role:

- Led the evaluation of funded programs to prevent and reduce chronic diseases and their associated risk factors in US jurisdictions in the Pacific and Caribbean, which included:
 - Creating an evaluation reporting template to help awardees demonstrate their program's progress, success, and impacts.
 - Providing technical assistance in person and by email and phone on revising and implementing evaluation plans, collecting data, and completing a final evaluation report.
 - Compiling, analyzing, and utilizing performance measure data to document awardee progress, improve the performance measure data collection process, such as reducing over 100 performance measures to approximately 40, and demonstrate progress made during the cooperative agreement.
- Designed an evaluation of a chronic disease self-management program in the Pacific, which included developing an evaluation plan, developing data collection tools and processes, and collecting data on chronic disease self-management program implementation and participation.
- Developed evaluation case studies to demonstrate how states use a shared risk and protective factor approach to prevent multiple forms of violence, which will be posted on CDC's VetoViolence online training portal to help state health departments more efficiently and effectively prevent violence in their states.

Industry: Non-Profit Sector: Health Care

Program Coordinator; 5 years

Seattle Children's Hospital

Implement and evaluate policy, systems, and environmental changes to prevent childhood drowning and improve community health.

Role:

- Planned and implemented a mixed methods policy evaluation, including an online survey and key informant interviews, on the Washington State Boating Under the Influence (BUI) law, which was used to improve the implementation of the law by prosecutors and law enforcement officers.
- Synthesized research and wrote policy analysis memos to demonstrate the effectiveness of drowning prevention strategies, which resulted in law enforcement and boating agencies collaborating on a common strategy and pursuing a change to the BUI law.
- Led a working group to identify and reach consensus on best practices for developing and managing designated swim areas, which was compiled into the Washington State Designated Swim Area Guidelines and disseminated on the Washington State Department of Health website giving local agencies easy access to the guidelines.
- Effectively worked with multiple parties of interest/influence to produce a community report, which included selecting stories; managing deliverables; reviewing report drafts with multiple parties of

interest/influence; editing and rewriting stories to reflect parties of interest/influence input; and disseminating the report to the community.

- Facilitated a high school community health PhotoVoice project, which was used to identify youth perceptions of community health for the hospital's community health assessment report.
- Collaborated with multi-sector parties of interest/influence to develop the Washington State Drowning Death Investigation Tool, which was pilot tested by local law enforcement and coroners, to improve drowning surveillance data within Washington State.
- Coordinated multiple projects to meet deliverables for a Centers for Disease Control and Prevention child injury policy grant and coordinated bi-annual meetings for the Washington State Drowning Prevention Network.

Education

Master of Public Health, Social and Behavioral Sciences

University of Washington - Seattle

Master of Social Work, Policy

University of Washington – Seattle

Certificate in Maternal and Child Health

University of Washington - Seattle

Bachelor of Arts, Sociology

Beloit College

Professional Affiliations / Certifications

- American Evaluation Association, Member
- American Public Health Association, Member

Publications

- Stempski S, Liu L, Grow HM, Pomietto M, **Chung C**, Shumann A, Bennett E. Everyone Swims: a community partnership and policy approach to address health disparities in drowning and obesity. Health Education & Behavior 2015 doi: 10.1177/1090198115570047.
- Bennett, E, Linnan M, **Chung C** (2014) Community-Level Interventions. In J Bierens (Ed), Drowning: Prevention, Rescue, and Treatment (251-260). Berlin: Springer-Verlag.
- **Chung C**, Quan L, Bennett E, Kernic M, Ebel M. Informing policy on open water drowning prevention: an observational survey of life jacket use in Washington State. Inj Prev Published Online First: Feb 12, 2014 doi:10.1136/injuryprev-2013-041005.

Presentations

- **Chung C**, Peters M (2015) From Design to Practice – Using Policy Evaluation to Improve Interventions. Webinar Presentation for the WPIPN Regional Network.
- **Chung C**, Bennett E, Williams K, Quan L (2013) “A Policy Strategy Plan to Prevent Open Water Drowning among Children and Teens in Washington State.” Oral Presentation at the Annual Injury Free Coalition for Kids Conference.
- **Chung C**, Quan L, Bennett E, Kernic M, Ebel E (2012) “Observation of Boaters’ use of Personal Flotation Devices.” Oral presentation at Pediatric Academic Societies Annual Meeting.

9. Sara Usha Maillacheruvu [PROPRIETARY]

Sara Usha Maillacheruvu

Deloitte Consulting LLP

Consultant

Education

Carnegie Mellon University, Heinz College

Aug. 2021 – May 2023

Degree: M.S. in Public Policy and Management – Data Analytics (High Honors)

The University of Chicago

Sep. 2014 – June 2018

Degrees: B.A. in English (Honors) and in South Asian Languages & Civilizations

Skills and Proficiencies

Technical: Excel, SQL, R, Python; **Design:** Tableau, Flourish, Microsoft Suite, Venngage, Shorthand

Policy Experience: Economic development, local government, housing policy, food insecurity, transportation

Featured Academic Project

POGOH (Pittsburgh-area bikeshare program) | **Project Manager**

Jan. 2023 – May 2023

- Led interdisciplinary team of 6 and managed client relations by establishing regular check-ins and creating biweekly slide decks and data visualizations to communicate project progress and solicit client feedback
- Developed three-staged transportation optimization model to maximize overall network equity as a data-driven tool to guide client in its station siting process

Professional Experience

Center on Budget and Policy Priorities (CBPP)

Remote/Washington, D.C.

Data Analyst Intern

Jan. 2023 – May 2023

- Wrangled and analyzed ACS and education data in R using API for report on college costs and assistance
- Designed and implemented novel analysis in R of pandemic-era household expenditures to identify key demographic groups driving inflation to enrich policy conversations with data-driven insights
- Created user guide for messy BLS expenditure data, resulting in significant time savings for future staff

Communities Left Behind – Asset Mapping Tool

Pittsburgh, PA

Research Assistant

Jan. 2022 – February 2023

- Iteratively designed series of UI/UX mockups of online asset mapping tool by collecting and prioritizing user feedback to harmonize features desired by stakeholders with technical team's capacity and capability
- Planned and facilitated community meeting with 30 government officials, citizens, and nonprofit stakeholders to gather feedback on online tool, thematizing findings to redesign tool for greater accessibility to populations with diverse technology skills

Government Accountability Office

Remote/Washington, DC

Graduate Analyst Intern

May 2022 – Aug. 2022

- Created methodology in Excel to select representative sample of state/local agencies to interview in order to develop findings for report to Congress on traffic-mitigating technologies
- Led and designed interviews with Department of Transportation officials on Intelligent Transportation Systems surveys and databases, identifying needs and gaps in online services

Congressional Hunger Center via Native American Agriculture Fund and CBPP

Remote/Washington, D.C.

Bill Emerson Hunger Fellow

Aug. 2020 – Aug. 2021

- Synthesized 40+ academic and other sources to conduct extensive literature review for [foundational report](#) (single author) on historical determinants of food insecurity for Native American communities to ensure think tank's proposed interventions are culturally-sensitive and build off past policy successes
- Researched, wrote, and presented [policy report](#) on land issues and funding gaps in Native agriculture to 80+ stakeholders during national "State of Hunger" webinar to assist NAAF in identifying leverage points in its grant portfolio

City of Peoria, IL

Peoria, IL

Urban Planner

Aug. 2019 – Aug. 2020

- Managed multi-departmental stakeholder team of 10 in reviewing requirements, preparing budget, and completing site assessment for \$1.85-million State of Illinois infrastructure grant for Complete Streets project
- Interpreted, enforced, and drafted text amendments to zoning code, including developing Short-Term Rental Ordinance to create legal pathway for online vacation rental sites to operate within city limits
- Wrote and received two grants (\$40,000) to execute farmers markets to pilot community-driven, market-based solutions to food insecurity on Peoria's Southside by managing diverse stakeholders including hospital systems, community groups, and nonprofits

Grants Coordinator & Grants/Community Planning Fellow

Sep. 2018 – Aug. 2019

- Managed \$200,000 portfolio of HUD and local funds addressing affordable housing and homelessness

- Researched affordable housing and poverty trends and created data visualizations of Census and ACS data in Excel to prepare reports and presentations with relevant policy interventions — such as inclusionary zoning and housing trust funds — to guide City Council’s decision making
- Analyzed Census and community survey data and wrote significant portions of Peoria’s Consolidated Plan for HUD approval to ensure compliance with federal regulations (e.g., HIPAA)

10. Sristy Acharya [PROPRIETARY]

Sristy Acharya

Deloitte Consulting LLP

Consultant

Summary of Experience and Qualifications

Sristy Acharya is a Consultant within the Government and Public Services (GPS) practice in the Core Business Operations offering portfolio. She brings 3+ years of experience across government agencies with focuses on community health/outreach, epidemiology, public health policy and communication with internal and external stakeholders. Her experiences working in the field have helped her develop public health competencies such as analytic and assessments, cultural competency, community dimensions of public health, public health science, and program management. She is passionate about observing epidemiology through a health equity lens and using biological principles to study the distribution of disease in a specific population.

Deloitte Experience

Industry: Government Sector: Federal Health

Offering Portfolio: CBO Operations Transformations

Consultant; March 2022 – Present

The Eunice Kenny Shriver National Institute of Child Health and Human Development (NICHD) contracted Deloitte to provide professional services in support of NICHD’s efforts to better-manage delivery of enterprise-level solutions to its stakeholders and customers, advance NICHD’s mission and manage their large portfolio of projects. The STRIVE (Strategies to Enrich Inclusion and Promote Equity) team supports the development and implementation of DEIA strategies within the Office of Health Equity (OHE), providing services across three workstreams to ensure equity, diversity, and inclusion in the workforce, enhance opportunities in the scientific workforce, and drive health disparity research.

Role:

- Lead strategic and program management support the Health Disparities Research (HDR) workstream
- Support creation of 5 year Actions Plans to meet NICHD strategic goals for increasing equity, diversity, and inclusion
- Create and compile committee insights for stakeholder review
- Assist Senior Executive leadership with strategic and operational planning
- Organize and streamline communication of NIH-wide conferences and events
- Identify client priorities and create insightful visualizations of demographic and geographic data

Previous Experience

Industry: Government Sector: Federal Health

Centers for Disease Control and Prevention (CDC)

Public Health Advisor within the PHAP Program; 13 months.

Host Site: NACCHO (National Association of County and City Health Officials); Communications Specialist

Role:

- Developed multi-channelled communication networks to communicate evidence-based science and advise best practices to internal/external stakeholders, local health departments and their jurisdictions.
- Worked across NACCHO’s project portfolio to strategically develop, implement, and disseminate new/existing tools and resources to communicate emerging health challenges affecting local public health practice.

Deployment - Tribal Support Section; Epidemiologist

Role:

- Compiled, analyzed, and disseminated epidemiologic data using R and data visualization on the status of COVID-19 hospitalization, vaccination, and mortality rates among tribal nations.
- Coordinated with state/local health departments, tribal epidemiology centers, and CDC epidemiologists to gather and study data reports which helped in implementing scientific guidelines and informing the public of latest scientific knowledge.
- Developed and managed weekly COVID-19 scientific reports using internal/external resources to ensure an increase of vaccination status among different tribes in the US.
- Refined strategies to build rapport with tribal leaders and better understand the cultural gaps which create vaccine hesitancy.

Industry: Laboratory Sciences Sector: Other

Mako Medical Labs

Molecular Scientist; 2 months.

Role:

- Performed DNA/RNA extraction, quantification, and gel QC per Standard Operating Procedures
- Utilized the LIMS system to process patient data and results from SARS-CoV-2 test samples
- Performed PCR, qPCR data analysis, PCR clean up, and DNA sequencing per SOPs
- Monitored positive and negative controls as a part of quality control

Industry: Government Sector: State

Agency: AmeriCorps – VISTA

Wake County Food Relief Summer Associate; 4 months.

Role:

- Assisted with food relief efforts in Wake County in partnership with Wake County Public Schools, Summer Food Programs, and community non-profit organizations
- Distributed vital food and resources to communities economically impacted by COVID-19 and provided easy access to summer learning grab and go activity kits
- Collaborated and connected alongside food security partners across the county to assist food pantries and food banks

System Experience

Development Tools / Languages: SQL (Intermediate), R (Intermediate), Tableau (Proficient)– Project Experience

General Tools: Microsoft PowerPoint, Microsoft Word, Microsoft Excel, Microsoft Teams, Microsoft SharePoint (Expert)

Education

Milken Institute School of Public Health – George Washington University

Master of Public Health, Epidemiology

January 2021 – Present

North Carolina State University; Bachelor of Arts, Biological Sciences

Integrative Public Health and Nutrition

August 2016 – May 2020

Foreign Language Skills

- Nepali – Native
- Hindi – Native
- Spanish – Proficient

11. Melissa Taylor [PROPRIETARY]

Melissa Taylor

Deloitte & Touche LLP

Consultant

Summary of Experience and Qualifications

Melissa Taylor is a Consultant within GPS Risk and Financial Advisory's Regulatory Compliance & Operational Risk practice. She currently provides Project Management support for the Regulatory and Legal Support Business Strategy Activation. In this capacity, Melissa tracks investments, facilitates business case submissions, and oversees communications for the Offering Portfolio. Additionally, Melissa provides embedded strategy support to a federal law enforcement agency, as well as Advisory Consultant work for the Department of State Smart Ports Initiative.

Prior to Deloitte, Melissa was a Social Studies Instructional Designer in North Texas for 8 years. During her tenure, Melissa was awarded several grants for international education cross-cooperation, where she worked directly with education agencies and schools in Latin America, East Asia, and the Middle East. Melissa completed her MA in International Relations and Diplomacy in December 2022.

Experience

Risk & Financial Advisory Consultant

- Provides embedded strategy support to a federal law enforcement agency. Produces and maintains project management tools and tracking for the Executive and Deputy Director(s), among other ad hoc duties, that align priorities and measure outcomes on behalf of the office.
- Provides Advisory Consultant support for the Department of State Smart Ports Initiative. Manages monthly reports, work plan, as well as organization and facilitation of workshop for participating states. Oversees the workstream for writing the Economic Security Report.
- Manages and oversees the GPS Advisory Regulatory & Legal Support Strategy Activation; tracks investments, marketing, communications, and eminence.
- Organizes FY24 Investment Business Cases and produces learning and development materials for the R&LS practice surrounding the business strategy activation.
- Coordinates among and between practitioners at a variety of levels to execute project management tasks with an excellent working knowledge of the firm.
- Supports research for the IDO Europe and Eurasia BD Desk Market Outlook Report.
- Co-led social media campaign for USAID Georgia Green Transport and Logistics project.
- Leads the Education workstream for Regulatory & Legal Support People & Culture Initiative and coordinates efforts for practitioners to be involved, advance continuing education efforts, and participate in professional growth opportunities within the Offering Portfolio.
- Fellow of the AOU Women in Analytics Fellowship for beginner level experience in SQL, Python, Tableau, and Data Analytics.

Executive Coordinator

- Provided on-site logistical and operational support for two PPMD LEAD meetings in 2021 and 2022.
- Supported 11 PPMDs across Advisory, Audit, and Consulting with calendar management, time and expense management, project and meeting coordination, as well as other administrative duties.
- Arranged international and domestic travel for PPMDs and their teams to include transportation, accommodations, flights, meals, and itineraries.
- Developed material for quarterly "Women's Perspectives" fireside chats and panels for Women in Deloitte RFA Tech and Media.
- Facilitated onboarding training for the Executive Service Center.
- Assisted with logistical, A/V, catering, and the overall organization and facilitation for on- and off-site labs for 40+ R&LS PPMDs focused on strategy and OP development.

Certifications

Technical Writing – University of North Texas - 2013

Education

United Nations Institute for Training & Research | Open University of Catalonia, M.A., International Relations and Diplomacy, 2022

University of North Texas, B.A., History, 2013

University of North Texas, B.A., English – Technical Writing, 2013

12. Ashleigh Williams [PROPRIETARY]

Ashleigh Williams

Deloitte Consulting LLP

Consultant

Summary of Experience and Qualifications

Ashleigh is a GPS Strategy & Analytics Consultant focused on program planning/implementation, stakeholder engagement, public health communication and improving and innovating public sector health care to solve and strengthen community and national health outcomes. She is a strong, supportive leader with 5+ years of experience driving positive outcomes in the public health sector in the fields of program management, Community Based Participatory Research (CBPR), strategic communications and planning, Adolescent health, STD/STI Prevention, systems thinking, quality assurance (QA), and technical writing. Her interest includes Black Maternal Mortality/Health, Women's Health, Underserved and Underrepresented communities, Adolescent Health, STD/STI Prevention, Gender Equity, Diversity and Inclusion, and Health Equity. She also comes with experiences in biomedical research and has a passion for advocacy for multiple marginalized communities.

Deloitte Project Experience

Industry: Government

Sector: Federal Health

Offering Portfolio: Strategy & Analytics

Offering: Cross Core Consulting

National Institutes of Health National Institute of Child Health and Human Development (NIH NICHD)

July 2023 – September 2023

Supported the NICHD with research reporting data call and preparing for the strategic plan refresh.

Role: Surge Support (Strategic Plan Facilitator) – responsible of developing a guide for the START tool, an NIH-wide system intended to track progress on strategic plans; supported development of the refresh timeline, brainstormed external engagement options, and identified initial recommendations for the internal NICHD working groups.

Industry: Government

Sector: Federal Health

Offering Portfolio: Strategy & Analytics

Offering: Cross Core Consulting

Department of Defense – Defense Health Agency Clinical Operations Program Management Support (DoD DHA COPMS)

March 2023 – June 2023

Support Defense Health Agency (DHA) in program/project management, Military Health System (MHS) clinical stakeholder engagement, strategic communication, document development, meeting support and action tracking and follow-up.

Role: Functional Analyst – responsible for providing administrative support to recurring clinical communities (CC) with pre-meeting coordination agenda preparation, material consolidation, support during meetings, meeting minutes and action item tracking, file maintenance on client SharePoint site); support MHS clinicians and staff: advance clinical process improvement efforts, identify and standardize clinical best practices through policy and practice recommendations, track progress on CC initiatives, collaborate across stakeholder groups to maximize front-line impact.

Industry: Government

Sector: Federal Health

Offering Portfolio: Strategy & Analytics

Offering: Cross Core Consulting

Veterans Health Administration – Office of Healthcare Transformation Decision Support System (VHA OHT DSS)

September 2022 – March 2023

Support Veterans Affairs (VA) in developing an analysis of viable alternatives and gather requirements to replace and modernize their current Decision Support System (DSS) that estimates the cost associated with an array of Veteran services, primarily with health services.

Role: Project Coordinator/Requirements Prioritization Team Support – responsible for overall coordination of project effort, functional and operational risk management; work with SMEs in developing and documenting current and future state prioritized system requirements.

Industry: Government

Sector: Federal Health

Offering Portfolio: Strategy & Analytics

Offering: Cross Core Consulting

Centers for Medicare and Medicaid Services (CMS)**Medicare Part C Improper Payment Measure (IPM) | Office of Financial Management (OFM)****Center for Program Integrity (CPI) | Risk Adjustment Data Validation (RADV)**

July 2021 – July 2022

Support CMS in determining risk adjustment data validation activities to ensure the accuracy and integrity of Medicare Advantage (MA) risk adjustment payments. As part of the Quality Assurance (QA) team, assure data quality, completion, and analysis in establishing improper payment rate of Medicare Advantage reimbursement and health insurance claims.

Role: Technical Writer/Project Management Operations Support (PMO)/Quality Assurance Support (QA) – responsible for creating simplified user content, including technical manuals, training guides, journal articles, tutorials, and requirements documentations; works with subject matter experts (SME) to make complex information and sooth technical communication (in print and audio visual if applicable) between CMS and the technical authors and accessible to employees and the target audience.

Deloitte Firm/Marketplace Experience**Building Bridges (2B) International – Analyst/Consultant Program (Firm Initiative)****International Center of Excellence (ICOE)**

September 2022 – Present

Support Deloitte in participating in the skills-based volunteering program that provides opportunities for analysts, consultants, and senior consultants to create social impact, foster network growth, and strengthen leadership skills internationally.

Role: Learning & Development Lead – responsible for analyzing survey feedback for future improvements, collaborate with program and trip leads to support firm wide social impact knowledge management strategy, lead training sessions with project teams, and report out on both social and talent impact of each session.

HealthPrism – Internal Project

August 2022 – Present

Support Deloitte in producing S&A Assets and product development. HealthPrism is a predictive population health analytics platform designed to help states identify and support populations at-risk of various health conditions. The solution is a flexible platform designed to deliver insights into who is at elevated risk of a specified health condition, what barriers to treatment exist, and what interventions will best help that population.

Role: Researcher - responsible for conducting research on programs within the United States that programs successfully remove barriers to healthy outcome and promote pathways to self-sufficiency.

Building Bridges (2B) International – Analyst/Consultant Program**Ciudadanía: Community of Social Studies and Public Action**

May 2022 – June 2022

Support Deloitte in participating in the skills-based volunteering program that provides opportunities for analysts, consultants, and senior consultants to create social impact, foster network growth, and strengthen leadership skills internationally.

Role: Team Member - responsible for conducting current state assessment interviews and discussions with the client and assist with providing a centralized message and marketing strategy for the organization by providing engagement strategies and tools, and capacity building to utilize said tools.

Previous Experience**Morgan State University**

Industry: Higher Education

Program Coordinator; 3.5 years

Role: Supervised the Core Council and general body members including strategizing and creating engagement plans to meet annual program mission; developed strategies to recruit approximately 60 new members each academic year to build stronger community to empower Morgan women to develop a keen sense of self- efficacy to become effective leaders; developed and altered metrics to assess the effectiveness of the program via surveys, focus groups, and one-on-one interviews; tracked and maintained attendance, budget spending, and program justifications to ensure program is financially sound; Created and distributed monthly engagement newsletters to keep target audience informed about upcoming events, career opportunities, and changes to Council.

Planned Parenthood of Maryland (PPMD)**Industry:** Healthcare**School Based Health Education Liaison Intern; 3 months**

Role: Implemented PPM's medically accurate, inclusive, culturally sensitive, and nonjudgmental health education curriculum and one-to-one peer education to high school students; Participated in preparing and/or delivering biweekly educational workshops on various aspects of sexual and reproductive health to diverse audiences; Participated in the education and outreach volunteer orientation and training on sexual health topics, curriculum, and facilitation skills.

Morgan State University - PEEP THIS (Peers Engaging and Empowering Peers Towards Healthier and Informed Sex Practices)**Industry:** Higher Education & Healthcare**Student Program Coordinator; 2.5 years**

Role: Prepared and distributed 100+ health education materials including reports, bulletins, and visual aids such as films, videotapes, photographs, and posters; Developed and briefed health education and promotion programs at training workshops, conferences, schools, and community; Educated the Morgan community about safe sexual practices and mental health to promote healthier and safer lifestyles; Collaborated extensively with outside organizations to emphasize community outreach to promote healthier and safer sexual practices within and outside the local community.

Morgan State University – ASCEND (A Student-Centered Entrepreneurship Development for Biomedical Research)**Industry:** Higher Education & Life Sciences**Student Researcher; 2.5 years**

Role: Conducted surveys and collected data using methods such as interviews, questionnaires, focus groups, market analysis surveys, public opinion polls, literature reviews, and file reviews to identify and better understand the sources of stress among first generation college students; Collaborated with other researchers in the planning, implementation, and evaluation of surveys; Produced documentation of the questionnaire development process, data collection methods, sampling designs, and decisions related to sample statistical weighting; Analyzed data from surveys, old records, and case studies, using statistical software; Conducted research to gather information about survey topics; Prepared and presented summaries and analyses of survey data, including tables, graphs, and fact sheets that describe survey techniques and results.

Morgan State University – ASCEND Summer Research Institute (ASCEND SRI)**Industry:** Higher Education & Life Sciences**Student Intern; 3 months**

Role: Received training in biomedical research and scientific methods for biomedical research to identify and better understand the sources of stress among first generation college students; Developed and proposed a research project with 5 other colleagues on Sources of Stress in College students funded by the National Institutes of Health (NIH); A member of the first cohort of the implement research pilot program, ASCEND at Morgan State University.

Technical Experience

Microsoft Suite, SharePoint, Deloitte Survey Tools, Adobe, Zoom Webinar and Meeting Platforms, Canva, Asana, Box

Education**Morgan State University**

Baltimore, MD

Master of Public Health (2018 – 2020)

Bachelor of Science, Biology (2013 - 2017)

13. Hannah Rudolph [PROPRIETARY]**Hannah Rudolph****Deloitte Consulting LLP**

Consultant

Summary of Experience and Qualifications

Hannah is an consultant in the Digital Health market offering within Deloitte's Government and Public Services Practice. She graduated from Colgate University with a degree in Biology. Hannah has a strong interest in innovative life sciences, public health and healthcare analytic method. Prior to Deloitte, Hannah has years of experience working within scientific labs. This experience helped to develop an overall understanding of laboratory and hospital environments and prepared her to work within the healthcare field.

Deloitte Experience

Industry: Government & Public Services

Sector: Federal

Offering Portfolio: Core Business Operations

Project: CDC, National Center for Emerging and Zoonotic Infectious Diseases (October 2022-July 2022)

The Deloitte team is building a web platform for the CDC's One Health office that will house two information and data sharing tools for government officials and other relevant One Health partners. Both tools will bring together representatives from human, animal, and environmental health sectors to achieve the goals of prioritizing zoonotic diseases of greatest concern in a country or region and developing a visual depiction of zoonotic disease surveillance infrastructure across sectors (SurViz). Through this web platform, users will be able to access to either or both tools and access associated resources and support.

- Conducted interviews with field epidemiologists/scientists to identify gaps and pain points in the current system
- Lead sprint planning and the development of user stories to efficiently prepare for first launch of OHZDP Portal
- Conducted QA for website
- Conducted weekly check-ins with clients
- Lead user guide development and client demos of website
- Assisted with data cleaning and formatting using Excel Power Query
- Lead EPLC process and spearheaded all EPLC meetings with key clients

Industry: Government & Public Services

Sector: Federal

Offering Portfolio: Core Business Operations

Project: Veterans Health Administration - Electronic Health Record Modernization (March 2022-October 2022)

Deloitte's team supported the client in shaping the development of a new organizational model within the VHA. This consisted of helping to implement two new committees which would help to make clinical and business decisions for EHR modernization, thus helping to drive end-user adoption of the health information system changes across the enterprise. The Deloitte team's efforts have enhanced the organizational and people readiness elements of the optimized VHA's EHR system to improve the lives of more than 9 million Veterans, Patients and their family.

- Developed governance documents, organization models, decision rights, and RACI
- Supported the client in streamlining and migrating 18 clinical & business councils from one organization to another
- Conducted interviews with members of VHA leadership and with VHA SMEs
- Spearheaded the creation of questionnaires that yielded 118 responses from VHA staff and used the information to build out a comprehensive recommendation for the restructuring of the National Councils

Industry: Government & Public Services

Sector: Federal

Offering Portfolio: Core Business Operations

Project: IRS – Web Apps Child Tax Credit Portal (June 2021 – March 2022)

Mandated by ARP legislation, the Child Tax Credit Update Portal (CTCUP) launched 6 major PROD deployments in 6 months consisting of 18 major features, allowing \$94 billion in Advanced Child Tax Credit Payments to be distributed throughout 36M+ households and lift 3.5M+ child out of poverty

- Managed, developed and submitted all CTCUP contractible deliverables with a 100% acceptance rate
- Created and maintained executive demo decks and wrote out detailed script for each deployment which enabled client to accurately present the upcoming deployment to leadership

- Created Technical Go/No-Go deck for each deployment to present to leadership and gain approval to deploy
- Regularly communicated with client to provide Quad Chart updates for CTCUP scrum meetings consisting of percentages completed of CTCUP activities, next steps, accomplishments, and potential risks
- Filled out official candidate risk forms and created candidate risk decks to inform clients of potential risks and mitigation steps
- Developed and maintained daily IRS executive-level Splunk and Excel dashboards underscoring key operational usage metrics sourced by various data repositories

Previous Experience

Tufts University, Research Assistant; 5 months

- Studied Fibrodysplasia Ossificans Progressiva (FOP) in Zebrafish in attempts to identify a responsible gene and develop a form of gene therapy
- Extracted Zebrafish DNA and analyzed genes using qPCR method and gel electrophoresis in order to identify gene patterns
- Identified bone malformations among Zebrafish using fluorescence screening to classify fish as healthy or diseased
- Aided with injections for CRISPR on Zebrafish to develop a form of gene therapy that could one day be used on humans

Colgate University, Senior Biology Thesis; 6 months

- Thoroughly researched effects of deworming on gut microbiome, wrote a literature review and a grant proposal, and performed advanced data analysis in order to put together a thesis paper and poster presentation

Curative Inc, Clinical Lab Assitant; 11 months

- Aided in COVID-19 PCR-based testing by plating samples through both manual and automated techniques, in accordance to laboratory SOPs and safety protocols
- Helped to scale testing capacity from 20k to 150k FDA-certified oral swab test kits per day
- Cross-trained in the extraction and PCR labs, performing manual extraction independently and shadowing coworkers on liquid handling automation (Kingfisher and Biomek)
- Independently learned and followed strict SOP in order to make positive and negative controls for the entire lab
- Analyzed PCR results for controls to ensure all controls were valid

Education

Bachelor of Arts in Biology

Colgate University

14. Olivia Lopez [PROPRIETARY]

Olivia Lopez

Deloitte & Touche LLP

Analyst

Summary of Experience and Qualifications

Olivia Lopez is a Junior Analyst in Risk & Financial Advisory. She recently graduated from the University of Florida with an MS in Information Systems and Operations Management, specializing in Data Science.

She excels at reviewing data for anomalies and preparing it for review. She has years of experience in HR and higher education that helps her bring a personable side to a technical field. She thrives on challenges and enjoys helping others succeed.

In her free time, she likes to listen to podcasts and play fetch with her dog.

Education

University of Florida

Gainesville, FL

Master of Science in Information Systems and Operations Management

Concentration: Data Science

May 2023

GPA: 3.66

Bachelor of Arts in Business Administration

December 2020

Major: General Business Administration, Specialization: Sociology

GPA: 3.53

Experience

Deloitte & Touche LLC

Denver, CO

Analyst

July 2023 – Present

I provide internal control services related to financial reporting and third-party compliance within several industries include healthcare technology, financial services, and cybersecurity.

University of Florida

Gainesville, FL

Co-Instructor

June 2022– May 2023

I instructed 1,500 undergraduate students in International Business exposing the business environments, analysis, and operations in many parts of the world.

- Lectured about current world events and real-world simulation topics such as research and development, production, marketing, and finance.
- Collaborated with the lead instructor on creating new presentations and course material.
- Supported students by answering questions in person, through email, and during weekly office hours.

Alachua County Human Resources Department

Gainesville, FL

Human Resources Analyst

April 2021 – November 2023

I performed specialized work in the analysis, administration, and application of various fields, including compensation, classification, employee appraisal, and training and development.

- Independently built a department-wide database to identify, sort, and export elements of over 500 job descriptions for further analysis.
- Assessed position classification ensuring the job description is comprehensive, the position is internally equitable, and the compensation is competitive.
- Constructed and analyzed reports and visualizations for requesters.
- Continued County-wide performance evaluation system administrator duties by being the main person of contact, maintaining the system data, and updating the training.

Human Resources Associate

October 2020 – April 2021

I launched a County-wide performance evaluation system for over 900 employees while supporting their acclimation to the new system.

- Prepared and implemented a County-wide performance evaluation system to establish a collaborative employee appraisal system.
- Maintained the performance evaluation system to keep the system data up to date.
- Prepared training on the system to allow for ease of use by end users and other administrative staff.

Involvement

University of Florida

Gainesville, FL

Teaching Assistant

August 2019 – December 2021

I assisted in Operations Management and Legal Environment of Business covering topics of design, operation, and control of the production system and the legal environment of organizations respectively.

- Held 4 office hours weekly to reinforce topics discussed in class and prepare for assignments and exams.
- Prepared class by transporting materials, proofreading exams, and grading assignments.
- Proctored exams to ensure student honesty and hold them to course ethics.

Awards and Honors

Equal Opportunity Committee Member

March 2022 – November 2022

Microsoft Office Specialist: Excel (2019)

March 2020

Greater Gator Award

August, July 2019

Appendix C: Exceptions to Terms

[PROPRIETARY] Deloitte & Touche LLP (“Deloitte”) is pleased to submit this proposal to James Madison University (“JMU”) in response to its Request for Proposal for Sponsored Programs Evaluation Services, dated October 2, 2023 (the “RFP”) for the performance of certain consulting services. We believe, however, that certain of the provisions included in the General Terms and Conditions and the Special Terms and Conditions included in the RFP (together, the “Proposed Terms”) should be modified or clarified for this particular engagement.

[PROPRIETARY] Our experience has indicated that almost without exception we have been able to reach agreement with each of our clients that has awarded us an engagement, including many other VASCUPP schools. We are confident that our experience with JMU will be no different. We believe that the basis for this success lies in the benefit of the negotiation process which allows each party to understand the other’s reasonable concerns. Our proposal is offered subject to the condition that Deloitte Consulting and JMU subsequently reach and enter into a mutually agreeable contract for the proposed services. If we are awarded this engagement, we intend to negotiate in good faith with JMU to reach such an agreement as expeditiously as possible.

[PROPRIETARY] The changes that we would seek to discuss consist of the following:

[PROPRIETARY] VII. General Terms and Conditions, Section O(2)(c), Changes to the Contract: We would like the opportunity to clarify that all changes to the services as agreed upon by the parties in the resulting contract shall be subject to the written approval of both parties. We look forward to developing a mutually acceptable change order process with JMU.

[PROPRIETARY] VII. General Terms and Conditions, Section Q, Insurance: We would like to discuss the following minor change to the insurance requirements in order to make these requirements consistent with the insurance that we (as well as other large professional services firms) maintain. We propose the following edits:

[PROPRIETARY] 3. Commercial General Liability - \$1,000,000 per occurrence and \$2,000,000 in the aggregate. Commercial General Liability is to include bodily injury and property damage, personal injury and advertising injury, products and completed operations coverage. The Commonwealth of Virginia must be added named as an additional insured to the policy by an endorsement and so endorsed on the policy.

VIII. Special Terms and Conditions, Section F, Renewal of Contract: We would like to clarify that the contract may be renewed by JMU under the terms and conditions of the original contract and at the rates outlined in our Proposal.

[PROPRIETARY] VIII. Special Terms and Conditions, Section M, Criminal Background Checks of Personnel Assigned By Contractor to Perform Work on JMU Property: As part of our current hiring policies, with respect to all newly hired personnel, Deloitte Consulting performs standard background checks. We look forward to additional discussion during negotiations regarding the applicability of the background check requirement based upon the scope of services.

[PROPRIETARY] VIII. Special Terms and Conditions, Section N, Indemnification: We would like the opportunity to clarify the indemnification obligations under the Special Terms and Conditions to place reasonable, commercially standard parameters on Contractors’ indemnification obligations. We propose the following edits:

[PROPRIETARY] “Contractor agrees to indemnify, defend and hold harmless the Commonwealth of Virginia, its officers, agents, and employees from any claims, damages and actions of any kind or nature, whether at law or in equity, (1) for bodily injury, death, or physical damage to real or tangible personal property to the extent arising from or caused by the negligence or intentional misconduct of Contractor or its subcontractors while engaged in performing the use of any materials, goods, or equipment of any kind or nature furnished by the contractor/any

[PROPRIETARY] services of any kind or nature furnished by the contractor provided that such liability is not attributable to the sole negligence of the using agency; and (2) for infringement by a deliverable of any U.S. patent existing at the time of delivery or copyright or any unauthorized use of any trade secret, except to the extent that such infringement or unauthorized use arises from (i) modification of the deliverable other than by Contractor or its subcontractors, or to failure of the using agency to use the deliverables materials, goods, or equipment in the manner already and permanently described by the contractor on the materials, goods or equipment delivered, (ii) the failure of JMU to use any corrections or modifications made available by Contractor, (iii) information, materials, instructions, specifications, requirements or designs provided by or on behalf of JMU, or (iv) the use of the deliverable in combination with any platform, product, network or data not provided by Contractor. If JMU's use of any such deliverable, or any portion thereof, is or is likely to be enjoined by order of a court of competent jurisdiction as such an infringement or unauthorized use, Contractor, at its option and expense, shall have the right to (x) procure for JMU the continued use of such deliverable, (y) replace such deliverable with a non-infringing deliverable, or (z) modify such deliverable so it becomes non-infringing; provided that, if (y) or (z) is the option chosen by Contractor, the replacement or modified deliverable is capable of performing substantially the same function. In the event Contractor cannot reasonably procure, replace or modify such deliverable in accordance with the immediately preceding sentence, Contractor may require JMU to cease use of such deliverable and refund the professional fees paid to Contractor with respect to the services giving rise to such deliverable. The foregoing provisions of this Section constitute the sole and exclusive remedy of JMU, and the sole and exclusive obligation of Contractor, relating to a claim that any of Contractor's deliverables infringes any patent, copyright or other intellectual property right of a third party.

[PROPRIETARY] Addition of a default term to the Special Terms and Conditions that provides an opportunity to cure a default, if curable, and a clarification that JMU can seek as damages the amount by which the reasonable fees actually paid by JMU to perform the terminated services exceeds the fees that JMU would otherwise have paid to Deloitte Consulting to perform such services, subject to the contract's reasonable limitation of liability, such as the following as an example: "In case of failure to deliver particular deliverables or services in accordance with the contract terms and conditions, notwithstanding anything to the contrary in this Contract, JMU, after due written notice and an opportunity to cure of at least ten (10) business days, if not then thus cured, may terminate such services and procure them from other sources and seek via dispute resolution processes to hold the contractor responsible for any resulting, reasonably additional purchase and administrative costs to the extent they exceed those that JMU would have paid contractor for the replaced deliverable(s) or services, subject to the limitation of liability in this Contract. This remedy shall be in addition to any other remedies which JMU may have."

[PROPRIETARY] Addition of a limitation of liability to the Special Term and Conditions, such as the following as an example: "The contractor, its subcontractors, and their respective personnel shall not be liable to JMU for any claims, liabilities, or expenses relating to this Contract, any Statement of Work/Purchase Order, or the Services ("Claims") for an aggregate amount in excess of the fees paid by JMU to the contractor under such Statement of Work/Purchase Order, except to the extent resulting from the recklessness or intentional misconduct of the contractor or its subcontractors. In no event shall the contractor, its subcontractors, or their respective personnel be liable for any consequential, special, indirect, incidental, punitive or exemplary loss, damage, or expense, relating to this Contract, any Statement of Work/Purchase Order, or the Services."

Attachment A. Offeror Data Sheet

ATTACHMENT A

OFFEROR DATA SHEET

TO BE COMPLETED BY OFFEROR

1. **QUALIFICATIONS OF OFFEROR:** Offerors must have the capability and capacity in all respects to fully satisfy the contractual requirements.
2. **YEARS IN BUSINESS:** Indicate the length of time you have been in business providing these types of goods and services.

Years 175+ Months _____

3. **REFERENCES:** Indicate below a listing of at least five (5) organizations, either commercial or governmental/educational, that your agency is servicing. Include the name and address of the person the purchasing agency has your permission to contact.

CLIENT	LENGTH OF SERVICE	ADDRESS	CONTACT PERSON/PHONE #
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Please refer to Appendix A for a list of references

4. List full names and addresses of Offeror and any branch offices which may be responsible for administering the contract.

Julie Beecher, Managing Director

1919 N Lynn St Suite 1500, Arlington, VA 22209

5. **RELATIONSHIP WITH THE COMMONWEALTH OF VIRGINIA:** Is any member of the firm an employee of the Commonwealth of Virginia who has a personal interest in this contract pursuant to the CODE OF VIRGINIA, SECTION 2.2-3100 – 3131?

[] YES [X] NO

IF YES, EXPLAIN: NA

Attachment B. Small, Women and Minority-owned Businesses (SWaM) Utilization Plan

ATTACHMENT B

Small, Women and Minority-owned Businesses (SWaM) Utilization Plan
Offeror Name: Deloitte & Touche LLP **Preparer Name:** Julie Beecher

Date: 11/1/2023

Is your firm a **Small Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes _____ No x

If yes, certification number: _____ Certification date: _____

Is your firm a **Woman-owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes _____ No x

If yes, certification number: _____ Certification date: _____

Is your firm a **Minority-Owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes _____ No x

If yes, certification number: _____ Certification date: _____

Is your firm a **Micro Business** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes _____ No x

If yes, certification number: _____ Certification date: _____

Instructions: *Populate the table below to show your firm's plans for utilization of small, women-owned and minority-owned business enterprises in the performance of the contract. Describe plans to utilize SWaMs businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc.*

Small Business: "Small business " means a business, independently owned or operated by one or more persons who are citizens of the United States or non-citizens who are in full compliance with United States immigration law, which, together with affiliates, has 250 or fewer employees, or average annual gross receipts of \$10 million or less averaged over the previous three years.

Woman-Owned Business Enterprise: A business concern which is at least 51 percent owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more women, and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWaM Program, all certified women-owned businesses are also a small business enterprise.**

Minority-Owned Business Enterprise: A business concern which is at least 51 percent owned by one or more minorities or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more minorities and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWaM Program, all certified minority-owned businesses are also a small business enterprise.**

Micro Business is a certified Small Business under the SWaM Program and has no more than twenty-five (25) employees AND no more than \$3 million in average annual revenue over the three-year period prior to their certification.

All small, women, and minority owned businesses must be certified by the Commonwealth of Virginia Department of Small Business and Supplier Diversity (SBSD) to be counted in the SWaM program. Certification applications are available through SBSD at 800-223-0671 in Virginia, 804-786-6585 outside Virginia, or online at <http://www.sbsd.virginia.gov/> (Customer Service).

RETURN OF THIS PAGE IS REQUIRED

Attachment B. Small, Women and Minority-owned Businesses (SWaM) Utilization Plan, Cont.

ATTACHMENT B (CNT'D)

Small, Women and Minority-owned Businesses (SWaM) Utilization Plan

Procurement Name and Number: Sponsor Programs Evaluation Services, FDC-1189

Date Form Completed: 11/1/2023

Listing of Sub-Contractors, to include, Small, Woman Owned and Minority Owned Businesses
for this Proposal and Subsequent Contract

Offeror / Proposer:

Deloitte & Touche LLP

Firm

1919 N Lynn St. Suite 1500 Arlington, VA 22209

Address

Julie Beecher, 703-638-0374

Contact Person/No.

Sub-Contractor's Name and Address	Contact Person & Phone Number	SBSD Certification Number	Services or Materials Provided	Total Subcontractor Contract Amount (to include change orders)	Total Dollars Paid Subcontractor to date (to be submitted with request for payment from JMU)
N/A	N/A	N/A	N/A	N/A	N/A

(Form shall be submitted with proposal and if awarded, again with submission of each request for payment)

RETURN OF THIS PAGE IS REQUIRED



Request for Proposal

RFP# FDC-1189

Sponsored Programs Evaluation Services

October 2, 2023



REQUEST FOR PROPOSAL

RFP# FDC-1189

Issue Date: October 2, 2023
Title: Sponsored Programs Evaluation Services
Issuing Agency: Commonwealth of Virginia
James Madison University
Procurement Services MSC 5720
752 Ott Street, Wine Price Building
First Floor, Suite 1023
Harrisonburg, VA 22807

Period of Contract: From Date of Award Through One Year (Renewable)

Sealed Proposals Will Be Received Until 2:00 PM on November 2, 2023 for Furnishing the Services Described Herein.

SEALED PROPOSALS MAY BE MAILED, EXPRESS MAILED, OR HAND DELIVERED DIRECTLY TO THE ISSUING AGENCY SHOWN ABOVE.

All inquiries for information and clarification should be directed To: Doug Chester, Buyer Senior, Procurement Services, chestefd@jmu.edu; 540-568-4272; (Fax) 540-568-7935 not later than five business days before the proposal closing date.

NOTE: THE SIGNED PROPOSAL AND ALL ATTACHMENTS SHALL BE RETURNED.

In compliance with this Request for Proposal and to all the conditions imposed herein, the undersigned offers and agrees to furnish the goods/services in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation.

Name and Address of Firm:

By:

(Signature in Ink)

Name:

(Please Print)

Date:

Title:

Web Address:

Phone:

Email:

Fax #:

ACKNOWLEDGE RECEIPT OF ADDENDUM: #1_____ #2_____ #3_____ #4_____ #5_____ (please initial)

SMALL, WOMAN OR MINORITY OWNED BUSINESS:

☐ YES; ☐ NO; *IF YES* ⇒ ☐ SMALL; ☐ WOMAN; ☐ MINORITY ***IF MINORITY:*** ☐ AA; ☐ HA; ☐ AsA; ☐ NW; ☐ Micro

Note: This public body does not discriminate against faith-based organizations in accordance with the *Code of Virginia*, § 2.2-4343.1 or against an offeror because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment.

REQUEST FOR PROPOSAL

RFP # FDC-1189

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I. PURPOSE

The purpose of this Request for Proposal (RFP) is to solicit sealed proposals from qualified sources to enter into a contract to provide Sponsored Programs Evaluation Services for James Madison University (JMU), an agency of the Commonwealth of Virginia. Initial contract shall be for one (1) year with an option to renew for four (4) additional one-year periods.

II. BACKGROUND

James Madison University (JMU) is a comprehensive public institution in Harrisonburg, Virginia with an enrollment of approximately 22,000 students and more than 4,000 faculty and staff. There are over 600 individual departments on campus that support seven academic divisions. The University offers over 120 majors, minors, and concentrations. Further information about the University may be found at the following website: <http://www.jmu.edu>.

JMU pursues external funding for a variety of programs and special projects that advance the University's mission. External funding is sought from diverse sources, including federal, state, and local agencies, corporate entities, local and national grant making foundations, and private donors. Types of support received at the University includes grants, cooperative agreements, and contracts. In FY2023, JMU faculty and staff received a total > \$34M in external funding to promote research, instruction, outreach, and other activities. A full-report of FY2023 activity can be found at the following website:

https://www.jmu.edu/sponsoredprograms/newsletters-and-reports/fy23-ospannualreport_final.pdf

Increasingly, more sponsors require robust evaluation or assessment plans in their guidelines to receive funding. As a condition of funding, applicants are required to collect and report performance data to show the efficacy of programs. The University currently receives funding from various federal agencies such as the Department of Health and Human Services, Department of Education, Department of State, National Science Foundation, Department of Energy, National Endowment for the Arts, National Endowment for the Humanities, and Environmental Protection Agency as well as state, local, private, and corporate sponsors.

III. SMALL, WOMAN-OWNED AND MINORITY PARTICIPATION

It is the policy of the Commonwealth of Virginia to contribute to the establishment, preservation, and strengthening of small businesses and businesses owned by women and minorities, and to encourage their participation in State procurement activities. The Commonwealth encourages contractors to provide for the participation of small businesses and businesses owned by women and minorities through partnerships, joint ventures, subcontracts, and other contractual opportunities. Attachment B contains information on reporting spend data with subcontractors.

IV. STATEMENT OF NEEDS

James Madison University seeks to contract with an experienced Contractor(s) to provide evaluation services on an as-needed basis for the various externally-funded programs at the University. Contractors should have expertise in program evaluation and research design, management of complex, multi-site evaluation projects with multiple stakeholders, and scientific research methodologies including the development of surveys and other data collection instruments as well as sampling, testing, and statistical analysis. Contractors should also have experience related to a regulatory environment and compliance, such as the Health Insurance Portability and Accountability Act (HIPAA), and working with Institutional Review Boards or Institutional Animal Care and Use Committees. At the request of the University, Offerors shall create logic models, develop evaluation design plans that include formative and summative assessments and both qualitative and quantitative evaluation methods, create and implement data

collection and sampling plans, conduct analyses, write reports, and disseminate results. Some programs may require evaluators with specific skills related to a particular field (i.e. biology, education, human services, engineering).

Describe in detail your firm's approach to each of the following items. Failure to provide responses to the items listed below may result in rejection of the proposal.

- A. Describe in detail the firm's qualifications and expertise in providing evaluation services to organizations similar in size and scope to James Madison University.
- B. Provide a detailed description of the firm's areas of expertise (i.e. biology, education, human services). Include general and specific evaluation design specialties/expertise.
- C. Describe in detail the firm's prior evaluations of externally-funded projects, specifically any evaluations provided for governmental entities and institutions of higher education. Include a list of projects, funding agency, contact information to include name, phone number, and email address, and nature of the project as well as any additional information that would be helpful in evaluating the capacity and complexity of past projects.
- D. Describe any innovative or creative design approaches or strategies.
- E. Describe in detail the firm's evaluation planning and implementation methodology to include the following:
 - 1. Allocation of staff
 - 2. Management methods
 - 3. Systems to ensure maintenance of complete and accurate records
 - 4. Processes in place to protect personally identifiable information
 - 5. Potential use of subcontractors
 - 6. Commitment to project completion within time and budget constraints
- F. Describe your firm's quality control process, including mechanisms to detect and reduce fraud and errors in data collection.
- G. Describe your firm's software used for statistical analysis of data.
- H. Provide the names, titles, and resumes of key management personnel that may be assigned to perform work for James Madison University.
- I. Provide a sample evaluation plan, evaluation report, or executive summary for a recent project for which the firm provided evaluation services.

V. PROPOSAL PREPARATION AND SUBMISSION

A. GENERAL INSTRUCTIONS

To ensure timely and adequate consideration of your proposal, offerors are to limit all contact, whether verbal or written, pertaining to this RFP to the James Madison University Procurement Office for the duration of this Proposal process. Failure to do so may jeopardize further consideration of Offeror's proposal.

1. RFP Response: In order to be considered for selection, the **Offeror shall submit a complete response to this RFP**; and shall submit to the issuing Purchasing Agency:
 - a. **One (1) original and seven (7) copies** of the entire proposal, INCLUDING ALL ATTACHMENTS. Any proprietary information should be clearly marked in accordance with 3.f. below.
 - b. **One (1) electronic copy in WORD format or searchable PDF (*flash drive*)** of the entire proposal, as a single document, INCLUDING ALL ATTACHMENTS. Any proprietary information should be clearly marked in accordance with 3.f. below.
 - c. Should the proposal contain **proprietary information**, provide **one (1) redacted hard copy** of the proposal and all attachments with **proprietary portions removed or blacked out**. This copy should be clearly marked "*Redacted Copy*" on the front cover. The classification of an entire proposal document, line-item prices, and/or total proposal prices as proprietary or trade secrets is not acceptable. JMU shall not be responsible for the Contractor's failure to exclude proprietary information from this redacted copy.

No other distribution of the proposal shall be made by the Offeror.

2. The version of the solicitation issued by JMU Procurement Services, as amended by an addenda, is the mandatory controlling version of the document. Any modification of, or additions to, the solicitation by the Offeror shall not modify the official version of the solicitation issued by JMU Procurement services unless accepted in writing by the University. Such modifications or additions to the solicitation by the Offeror may be cause for rejection of the proposal; however, JMU reserves the right to decide, on a case-by-case basis in its sole discretion, whether to reject such a proposal. If the modification or additions are not identified until after the award of the contract, the controlling version of the solicitation document shall still be the official state form issued by Procurement Services.
3. Proposal Preparation
 - a. Proposals shall be signed by an authorized representative of the Offeror. All information requested should be submitted. Failure to submit all information requested may result in the purchasing agency requiring prompt submissions of missing information and/or giving a lowered evaluation of the proposal. Proposals which are substantially incomplete or lack key information may be rejected by the purchasing agency. Mandatory requirements are those required by law or regulation or are such that they cannot be waived and are not subject to negotiation.
 - b. Proposals shall be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be placed on completeness and clarity of content.

- c. Proposals should be organized in the order in which the requirements are presented in the RFP. All pages of the proposal should be numbered. Each paragraph in the proposal should reference the paragraph number of the corresponding section of the RFP. It is also helpful to cite the paragraph number, sub letter, and repeat the text of the requirement as it appears in the RFP. If a response covers more than one page, the paragraph number and sub letter should be repeated at the top of the next page. The proposal should contain a table of contents which cross references the RFP requirements. Information which the offeror desires to present that does not fall within any of the requirements of the RFP should be inserted at the appropriate place or be attached at the end of the proposal and designated as additional material. Proposals that are not organized in this manner risk elimination from consideration if the evaluators are unable to find where the RFP requirements are specifically addressed.
 - d. As used in this RFP, the terms “must”, “shall”, “should” and “may” identify the criticality of requirements. “Must” and “shall” identify requirements whose absence will have a major negative impact on the suitability of the proposed solution. Items labeled as “should” or “may” are highly desirable, although their absence will not have a large impact and would be useful, but are not necessary. Depending on the overall response to the RFP, some individual “must” and “shall” items may not be fully satisfied, but it is the intent to satisfy most, if not all, “must” and “shall” requirements. The inability of an offeror to satisfy a “must” or “shall” requirement does not automatically remove that offeror from consideration; however, it may seriously affect the overall rating of the offeror’s proposal.
 - e. Each copy of the proposal should be bound or contained in a single volume where practical. All documentation submitted with the proposal should be contained in that single volume.
 - f. Ownership of all data, materials and documentation originated and prepared for the State pursuant to the RFP shall belong exclusively to the State and be subject to public inspection in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by the offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, the offeror must invoke the protection of Section 2.2-4342F of the Code of Virginia, in writing, either before or at the time the data is submitted. The written notice must specifically identify the data or materials to be protected and state the reasons why protection is necessary. The proprietary or trade secret materials submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information. The classification of an entire proposal document, line-item prices and/or total proposal prices as proprietary or trade secrets is not acceptable and will result in rejection and return of the proposal.
4. Oral Presentation: Offerors who submit a proposal in response to this RFP may be required to give an oral presentation of their proposal to James Madison University. This provides an opportunity for the Offeror to clarify or elaborate on the proposal. This is a fact-finding and explanation session only and does not include negotiation. James Madison University will schedule the time and location of these presentations. Oral presentations are an option of the University and may or may not be conducted. Therefore, proposals should be complete.

B. SPECIFIC PROPOSAL INSTRUCTIONS

Proposals should be as thorough and detailed as possible so that James Madison University may properly evaluate your capabilities to provide the required services. Offerors are required to submit the following items as a complete proposal:

1. Return RFP cover sheet and all addenda acknowledgements, if any, signed and filled out as required.
2. Plan and methodology for providing the goods/services as described in Section IV. Statement of Needs of this Request for Proposal.
3. A written narrative statement to include, but not be limited to, the expertise, qualifications, and experience of the firm and resumes of specific personnel to be assigned to perform the work.
4. Offeror Data Sheet, included as *Attachment A* to this RFP.
5. Small Business Subcontracting Plan, included as *Attachment B* to this RFP. Offeror shall provide a Small Business Subcontracting plan which summarizes the planned utilization of Department of Small Business and Supplier Diversity (SBSD)-certified small businesses which include businesses owned by women and minorities, when they have received Department of Small Business and Supplier Diversity (SBSD) small business certification, under the contract to be awarded as a result of this solicitation. This is a requirement for all prime contracts in excess of \$100,000 unless no subcontracting opportunities exist.
6. Identify the amount of sales your company had during the last twelve months with each VASCUPP Member Institution. A list of VASCUPP Members can be found at: www.VASCUPP.org.
7. Proposed Cost. See Section X. Pricing Schedule of this Request for Proposal.

VI. EVALUATION AND AWARD CRITERIA

A. EVALUATION CRITERIA

Proposals shall be evaluated by James Madison University using the following criteria:

	<u>Points</u>
1. Quality of products/services offered and suitability for intended purposes	20
2. Qualifications and experience of Offeror in providing the goods/services	30
3. Specific plans or methodology to be used to perform the services	20
4. Participation of Small, Women-Owned, & Minority (SWaM) Businesses	10
5. Cost	20
TOTAL	<u>100</u>

- B. AWARD TO MULTIPLE OFFERORS: Selection shall be made of two or more offerors deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposals, including price, if so stated in the Request for Proposals. Negotiations shall be conducted with the offerors so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each offeror so selected, the agency shall select the offeror which, in its opinion, has made the best proposal, and shall award the contract to that offeror. The Commonwealth reserves the right to make multiple awards as a result of this solicitation. The Commonwealth may cancel this Request for Proposals or reject proposals at any time prior to an award, and is not required to furnish a statement of the reasons why a particular proposal was not deemed to be the most advantageous. Should the Commonwealth

determine in writing and in its sole discretion that only one offeror is fully qualified, or that one offeror is clearly more highly qualified than the others under consideration, a contract may be negotiated and awarded to that offeror. The award document will be a contract incorporating by reference all the requirements, terms and conditions of the solicitation and the contractor's proposal as negotiated.

VII. GENERAL TERMS AND CONDITIONS

- A. PURCHASING MANUAL: This solicitation is subject to the provisions of the Commonwealth of Virginia's Purchasing Manual for Institutions of Higher Education and Their Vendors and any revisions thereto, which are hereby incorporated into this contract in their entirety. A copy of the manual is available for review at the purchasing office. In addition, the manual may be accessed electronically at <http://www.jmu.edu/procurement> or a copy can be obtained by calling Procurement Services at (540) 568-3145.
- B. APPLICABLE LAWS AND COURTS: This solicitation and any resulting contract shall be governed in all respects by the laws of the Commonwealth of Virginia and any litigation with respect thereto shall be brought in the courts of the Commonwealth. The Contractor shall comply with applicable federal, state and local laws and regulations.
- C. ANTI-DISCRIMINATION: By submitting their proposals, offerors certify to the Commonwealth that they will conform to the provisions of the Federal Civil Rights Act of 1964, as amended, as well as the Virginia Fair Employment Contracting Act of 1975, as amended, where applicable, the Virginians With Disabilities Act, the Americans With Disabilities Act and §10 of the Rules Governing Procurement, Chapter 2, Exhibit J, Attachment 1 (available for review at <http://www.jmu.edu/procurement>). If the award is made to a faith-based organization, the organization shall not discriminate against any recipient of goods, services, or disbursements made pursuant to the contract on the basis of the recipient's religion, religious belief, refusal to participate in a religious practice, or on the basis of race, age, color, gender, sexual orientation, gender identity, or national origin and shall be subject to the same rules as other organizations that contract with public bodies to account for the use of the funds provided; however, if the faith-based organization segregates public funds into separate accounts, only the accounts and programs funded with public funds shall be subject to audit by the public body. (*§6 of the Rules Governing Procurement*).

In every contract over \$10,000 the provisions in 1. and 2. below apply:

- 1. During the performance of this contract, the contractor agrees as follows:
 - a. The contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, sexual orientation, gender identity, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment, except where there is a bona fide occupational qualification reasonably necessary to the normal operation of the contractor. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.
 - b. The contractor, in all solicitations or advertisements for employees placed by or on behalf of the contractor, will state that such contractor is an equal opportunity employer.
 - c. Notices, advertisements, and solicitations placed in accordance with federal law, rule, or regulation shall be deemed sufficient for the purpose of meeting these requirements.

2. The contractor will include the provisions of 1. above in every subcontract or purchase order over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.
- D. ETHICS IN PUBLIC CONTRACTING: By submitting their proposals, offerors certify that their proposals are made without collusion or fraud and that they have not offered or received any kickbacks or inducements from any other offeror, supplier, manufacturer or subcontractor in connection with their proposal, and that they have not conferred on any public employee having official responsibility for this procurement transaction any payment, loan, subscription, advance, deposit of money, services or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value was exchanged.
 - E. IMMIGRATION REFORM AND CONTROL ACT OF 1986: By entering into a written contract with the Commonwealth of Virginia, the Contractor certifies that the Contractor does not, and shall not during the performance of the contract for goods and services in the Commonwealth, knowingly employ an unauthorized alien as defined in the federal Immigration Reform and Control Act of 1986.
 - F. DEBARMENT STATUS: By submitting their proposals, offerors certify that they are not currently debarred by the Commonwealth of Virginia from submitting proposals on contracts for the type of goods and/or services covered by this solicitation, nor are they an agent of any person or entity that is currently so debarred.
 - G. ANTITRUST: By entering into a contract, the contractor conveys, sells, assigns, and transfers to the Commonwealth of Virginia all rights, title and interest in and to all causes of action it may now have or hereafter acquire under the antitrust laws of the United States and the Commonwealth of Virginia, relating to the particular goods or services purchased or acquired by the Commonwealth of Virginia under said contract.
 - H. MANDATORY USE OF STATE FORM AND TERMS AND CONDITIONS RFPs: Failure to submit a proposal on the official state form provided for that purpose may be a cause for rejection of the proposal. Modification of or additions to the General Terms and Conditions of the solicitation may be cause for rejection of the proposal; however, the Commonwealth reserves the right to decide, on a case by case basis, in its sole discretion, whether to reject such a proposal.
 - I. CLARIFICATION OF TERMS: If any prospective offeror has questions about the specifications or other solicitation documents, the prospective offeror should contact the buyer whose name appears on the face of the solicitation no later than five working days before the due date. Any revisions to the solicitation will be made only by addendum issued by the buyer.
 - J. PAYMENT:
 1. To Prime Contractor:
 - a. Invoices for items ordered, delivered and accepted shall be submitted by the contractor directly to the payment address shown on the purchase order/contract. All invoices shall show the state contract number and/or purchase order number; social security number (for individual contractors) or the federal employer identification number (for proprietorships, partnerships, and corporations).
 - b. Any payment terms requiring payment in less than 30 days will be regarded as requiring payment 30 days after invoice or delivery, whichever occurs last. This shall not affect offers of discounts for payment in less than 30 days, however.

- c. All goods or services provided under this contract or purchase order, that are to be paid for with public funds, shall be billed by the contractor at the contract price, regardless of which public agency is being billed.
- d. The following shall be deemed to be the date of payment: the date of postmark in all cases where payment is made by mail, or the date of offset when offset proceedings have been instituted as authorized under the Virginia Debt Collection Act.
- e. **Unreasonable Charges.** Under certain emergency procurements and for most time and material purchases, final job costs cannot be accurately determined at the time orders are placed. In such cases, contractors should be put on notice that final payment in full is contingent on a determination of reasonableness with respect to all invoiced charges. Charges which appear to be unreasonable will be researched and challenged, and that portion of the invoice held in abeyance until a settlement can be reached. Upon determining that invoiced charges are not reasonable, the Commonwealth shall promptly notify the contractor, in writing, as to those charges which it considers unreasonable and the basis for the determination. A contractor may not institute legal action unless a settlement cannot be reached within thirty (30) days of notification. The provisions of this section do not relieve an agency of its prompt payment obligations with respect to those charges which are not in dispute (*Rules Governing Procurement, Chapter 2, Exhibit J, Attachment 1 § 53; available for review at <http://www.jmu.edu/procurement>*).

2. To Subcontractors:

- a. A contractor awarded a contract under this solicitation is hereby obligated:
 - (1) To pay the subcontractor(s) within seven (7) days of the contractor's receipt of payment from the Commonwealth for the proportionate share of the payment received for work performed by the subcontractor(s) under the contract; or
 - (2) To notify the agency and the subcontractors, in writing, of the contractor's intention to withhold payment and the reason.
 - b. The contractor is obligated to pay the subcontractor(s) interest at the rate of one percent per month (unless otherwise provided under the terms of the contract) on all amounts owed by the contractor that remain unpaid seven (7) days following receipt of payment from the Commonwealth, except for amounts withheld as stated in (2) above. The date of mailing of any payment by U. S. Mail is deemed to be payment to the addressee. These provisions apply to each sub-tier contractor performing under the primary contract. A contractor's obligation to pay an interest charge to a subcontractor may not be construed to be an obligation of the Commonwealth.
3. Each prime contractor who wins an award in which provision of a SWAM procurement plan is a condition to the award, shall deliver to the contracting agency or institution, on or before request for final payment, evidence and certification of compliance (subject only to insubstantial shortfalls and to shortfalls arising from subcontractor default) with the SWAM procurement plan. Final payment under the contract in question may be withheld until such certification is delivered and, if necessary, confirmed by the agency or institution, or other appropriate penalties may be assessed in lieu of withholding such payment.
4. The Commonwealth of Virginia encourages contractors and subcontractors to accept electronic and credit card payments.

- K. PRECEDENCE OF TERMS: Paragraphs A through J of these General Terms and Conditions and the Commonwealth of Virginia Purchasing Manual for Institutions of Higher Education and their Vendors, shall apply in all instances. In the event there is a conflict between any of the other General Terms and Conditions and any Special Terms and Conditions in this solicitation, the Special Terms and Conditions shall apply.
- L. QUALIFICATIONS OF OFFERORS: The Commonwealth may make such reasonable investigations as deemed proper and necessary to determine the ability of the offeror to perform the services/furnish the goods and the offeror shall furnish to the Commonwealth all such information and data for this purpose as may be requested. The Commonwealth reserves the right to inspect offeror's physical facilities prior to award to satisfy questions regarding the offeror's capabilities. The Commonwealth further reserves the right to reject any proposal if the evidence submitted by, or investigations of, such offeror fails to satisfy the Commonwealth that such offeror is properly qualified to carry out the obligations of the contract and to provide the services and/or furnish the goods contemplated therein.
- M. TESTING AND INSPECTION: The Commonwealth reserves the right to conduct any test/inspection it may deem advisable to assure goods and services conform to the specifications.
- N. ASSIGNMENT OF CONTRACT: A contract shall not be assignable by the contractor in whole or in part without the written consent of the Commonwealth.
- O. CHANGES TO THE CONTRACT: Changes can be made to the contract in any of the following ways:
1. The parties may agree in writing to modify the scope of the contract. An increase or decrease in the price of the contract resulting from such modification shall be agreed to by the parties as a part of their written agreement to modify the scope of the contract.
 2. The Purchasing Agency may order changes within the general scope of the contract at any time by written notice to the contractor. Changes within the scope of the contract include, but are not limited to, things such as services to be performed, the method of packing or shipment, and the place of delivery or installation. The contractor shall comply with the notice upon receipt. The contractor shall be compensated for any additional costs incurred as the result of such order and shall give the Purchasing Agency a credit for any savings. Said compensation shall be determined by one of the following methods:
 - a. By mutual agreement between the parties in writing; or
 - b. By agreeing upon a unit price or using a unit price set forth in the contract, if the work to be done can be expressed in units, and the contractor accounts for the number of units of work performed, subject to the Purchasing Agency's right to audit the contractor's records and/or to determine the correct number of units independently; or
 - c. By ordering the contractor to proceed with the work and keep a record of all costs incurred and savings realized. A markup for overhead and profit may be allowed if provided by the contract. The same markup shall be used for determining a decrease in price as the result of savings realized. The contractor shall present the Purchasing Agency with all vouchers and records of expenses incurred and savings realized. The Purchasing Agency shall have the right to audit the records of the contractor as it deems necessary to determine costs or savings. Any claim for an adjustment in price under this provision must be asserted by written notice to the Purchasing Agency within thirty (30) days from the date of receipt of the written order from the Purchasing Agency. If the parties fail to agree on an amount of adjustment, the question of an increase or decrease in the contract price or time for performance shall be resolved in accordance with the procedures for resolving disputes provided by the Disputes Clause of this

contract or, if there is none, in accordance with the disputes provisions of the Commonwealth of Virginia Purchasing Manual for Institutions of Higher Education and their Vendors. Neither the existence of a claim nor a dispute resolution process, litigation or any other provision of this contract shall excuse the contractor from promptly complying with the changes ordered by the Purchasing Agency or with the performance of the contract generally.

- P. DEFAULT: In case of failure to deliver goods or services in accordance with the contract terms and conditions, the Commonwealth, after due oral or written notice, may procure them from other sources and hold the contractor responsible for any resulting additional purchase and administrative costs. This remedy shall be in addition to any other remedies which the Commonwealth may have.
- Q. INSURANCE: By signing and submitting a proposal under this solicitation, the offeror certifies that if awarded the contract, it will have the following insurance coverage at the time the contract is awarded. For construction contracts, if any subcontractors are involved, the subcontractor will have workers' compensation insurance in accordance with § 25 of the Rules Governing Procurement – Chapter 2, Exhibit J, Attachment 1, and 65.2-800 et. Seq. of the Code of Virginia (available for review at <http://www.jmu.edu/procurement>) The offeror further certifies that the contractor and any subcontractors will maintain these insurance coverages during the entire term of the contract and that all insurance coverage will be provided by insurance companies authorized to sell insurance in Virginia by the Virginia State Corporation Commission.

MINIMUM INSURANCE COVERAGES AND LIMITS REQUIRED FOR MOST CONTRACTS:

1. Workers' Compensation: Statutory requirements and benefits. Coverage is compulsory for employers of three or more employees, to include the employer. Contractors who fail to notify the Commonwealth of increases in the number of employees that change their workers' compensation requirement under the Code of Virginia during the course of the contract shall be in noncompliance with the contract.
 2. Employer's Liability: \$100,000
 3. Commercial General Liability: \$1,000,000 per occurrence and \$2,000,000 in the aggregate. Commercial General Liability is to include bodily injury and property damage, personal injury and advertising injury, products and completed operations coverage. The Commonwealth of Virginia must be named as an additional insured and so endorsed on the policy.
 4. Automobile Liability: \$1,000,000 combined single limit. *(Required only if a motor vehicle not owned by the Commonwealth is to be used in the contract. Contractor must assure that the required coverage is maintained by the Contractor (or third-party owner of such motor vehicle.)*
- R. ANNOUNCEMENT OF AWARD: Upon the award or the announcement of the decision to award a contract over \$100,000, as a result of this solicitation, the purchasing agency will publicly post such notice on the DGS/DPS eVA web site (www.eva.virginia.gov) for a minimum of 10 days.
- S. DRUG-FREE WORKPLACE: During the performance of this contract, the contractor agrees to (i) provide a drug-free workplace for the contractor's employees; (ii) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the contractor's workplace and specifying the actions that will be taken against employees for violations of such prohibition; (iii) state in all solicitations or advertisements for employees placed by or on behalf of the contractor that the contractor maintains a drug-free workplace; and (iv) include the provisions of the foregoing clauses in every subcontract or purchase order of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.

For the purposes of this section, “drug-free workplace” means a site for the performance of work done in connection with a specific contract awarded to a contractor, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the contract.

T. NONDISCRIMINATION OF CONTRACTORS: An offeror, or contractor shall not be discriminated against in the solicitation or award of this contract because of race, religion, color, sex, sexual orientation, gender identity, national origin, age, disability, faith-based organizational status, any other basis prohibited by state law relating to discrimination in employment or because the offeror employs ex-offenders unless the state agency, department or institution has made a written determination that employing ex-offenders on the specific contract is not in its best interest. If the award of this contract is made to a faith-based organization and an individual, who applies for or receives goods, services, or disbursements provided pursuant to this contract objects to the religious character of the faith-based organization from which the individual receives or would receive the goods, services, or disbursements, the public body shall offer the individual, within a reasonable period of time after the date of his objection, access to equivalent goods, services, or disbursements from an alternative provider.

U. eVA BUSINESS TO GOVERNMENT VENDOR REGISTRATION, CONTRACTS, AND ORDERS: The eVA Internet electronic procurement solution, website portal www.eVA.virginia.gov, streamlines and automates government purchasing activities in the Commonwealth. The eVA portal is the gateway for vendors to conduct business with state agencies and public bodies. All vendors desiring to provide goods and/or services to the Commonwealth shall participate in the eVA Internet eprocurement solution by completing the free eVA Vendor Registration. All offerors must register in eVA and pay the Vendor Transaction Fees specified below; failure to register will result in the proposal being rejected. Vendor transaction fees are determined by the date the original purchase order is issued and the current fees are as follows:

Vendor transaction fees are determined by the date the original purchase order is issued and the current fees are as follows:

1. For orders issued July 1, 2014 and after, the Vendor Transaction Fee is:
 - a. Department of Small Business and Supplier Diversity (SBSD) certified Small Businesses: 1% capped at \$500 per order.
 - b. Businesses that are not Department of Small Business and Supplier Diversity (SBSD) certified Small Businesses: 1% capped at \$1,500 per order.
2. For orders issued prior to July 1, 2014 the vendor transaction fees can be found at www.eVA.virginia.gov.
3. The specified vendor transaction fee will be invoiced by the Commonwealth of Virginia Department of General Services approximately 60 days after the corresponding purchase order is issued and payable 30 days after the invoice date. Any adjustments (increases/decreases) will be handled through purchase order changes.

V. AVAILABILITY OF FUNDS: It is understood and agreed between the parties herein that the Commonwealth of Virginia shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this agreement.

W. PRICING CURRENCY: Unless stated otherwise in the solicitation, offerors shall state offered prices in U.S. dollars.

- X. E-VERIFY REQUIREMENT OF ANY CONTRACTOR: Any employer with more than an average of 50 employees for the previous 12 months entering into a contract in excess of \$50,000 with James Madison University to perform work or provide services pursuant to such contract shall register and participate in the E-Verify program to verify information and work authorization of its newly hired employees performing work pursuant to any awarded contract.
- Y. CIVILITY IN STATE WORKPLACES: The contractor shall take all reasonable steps to ensure that no individual, while performing work on behalf of the contractor or any subcontractor in connection with this agreement (each, a "Contract Worker"), shall engage in 1) harassment (including sexual harassment), bullying, cyber-bullying, or threatening or violent conduct, or 2) discriminatory behavior on the basis of race, sex, color, national origin, religious belief, sexual orientation, gender identity or expression, age, political affiliation, veteran status, or disability.

The contractor shall provide each Contract Worker with a copy of this Section and will require Contract Workers to participate in training on civility in the State workplace. Upon request, the contractor shall provide documentation that each Contract Worker has received such training.

For purposes of this Section, "State workplace" includes any location, permanent or temporary, where a Commonwealth employee performs any work-related duty or is representing his or her agency, as well as surrounding perimeters, parking lots, outside meeting locations, and means of travel to and from these locations. Communications are deemed to occur in a State workplace if the Contract Worker reasonably should know that the phone number, email, or other method of communication is associated with a State workplace or is associated with a person who is a State employee.

The Commonwealth of Virginia may require, at its sole discretion, the removal and replacement of any Contract Worker who the Commonwealth reasonably believes to have violated this Section.

This Section creates obligations solely on the part of the contractor. Employees or other third parties may benefit incidentally from this Section and from training materials or other communications distributed on this topic, but the Parties to this agreement intend this Section to be enforceable solely by the Commonwealth and not by employees or other third parties.

VIII. SPECIAL TERMS AND CONDITIONS

- A. AUDIT: The Contractor hereby agrees to retain all books, records, systems, and other documents relative to this contract for five (5) years after final payment, or until audited by the Commonwealth of Virginia, whichever is sooner. The Commonwealth of Virginia, its authorized agents, and/or State auditors shall have full access to and the right to examine any of said materials during said period.
- B. CANCELLATION OF CONTRACT: James Madison University reserves the right to cancel and terminate any resulting contract, in part or in whole, without penalty, upon 60 days written notice to the contractor. In the event the initial contract period is for more than 12 months, the resulting contract may be terminated by either party, without penalty, after the initial 12 months of the contract period upon 60 days written notice to the other party. Any contract cancellation notice shall not relieve the contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation.

- C. IDENTIFICATION OF PROPOSAL ENVELOPE: The signed proposal should be returned in a separate envelope or package, sealed and identified as follows:

From: _____

_____	_____	_____
Name of Offeror	Due Date	Time

Street or Box No.	RFP #	

City, State, Zip Code	RFP Title	

Name of Purchasing Officer: _____		

The envelope should be addressed as directed on the title page of the solicitation.

The Offeror takes the risk that if the envelope is not marked as described above, it may be inadvertently opened and the information compromised, which may cause the proposal to be disqualified. Proposals may be hand-delivered to the designated location in the office issuing the solicitation. No other correspondence or other proposals should be placed in the envelope.

- D. LATE PROPOSALS: To be considered for selection, proposals must be received by the issuing office by the designated date and hour. The official time used in the receipt of proposals is that time on the automatic time stamp machine in the issuing office. Proposals received in the issuing office after the date and hour designated are automatically non responsive and will not be considered. The University is not responsible for delays in the delivery of mail by the U.S. Postal Service, private couriers, or the intra university mail system. It is the sole responsibility of the Offeror to ensure that its proposal reaches the issuing office by the designated date and hour.
- E. UNDERSTANDING OF REQUIREMENTS: It is the responsibility of each offeror to inquire about and clarify any requirements of this solicitation that is not understood. The University will not be bound by oral explanations as to the meaning of specifications or language contained in this solicitation. Therefore, all inquiries deemed to be substantive in nature must be in writing and submitted to the responsible buyer in the Procurement Services Office. Offerors must ensure that written inquiries reach the buyer at least five (5) days prior to the time set for receipt of offerors proposals. A copy of all queries and the respective response will be provided in the form of an addendum to all offerors who have indicated an interest in responding to this solicitation. Your signature on your Offer certifies that you fully understand all facets of this solicitation. These questions may be sent by Fax to 540/568-7935.
- F. RENEWAL OF CONTRACT: This contract may be renewed by the Commonwealth for a period of four (4) successive one-year periods under the terms and conditions of the original contract except as stated in 1. and 2. below. Price increases may be negotiated only at the time of renewal. Written notice of the Commonwealth's intention to renew shall be given approximately 90 days prior to the expiration date of each contract period.
1. If the Commonwealth elects to exercise the option to renew the contract for an additional one-year period, the contract price(s) for the additional one year shall not exceed the contract price(s) of the original contract increased/decreased by no more than the percentage increase/decrease of the other services category of the CPI-W section of the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.
 2. If during any subsequent renewal periods, the Commonwealth elects to exercise the option to renew the contract, the contract price(s) for the subsequent renewal period shall not exceed the contract price(s) of the previous renewal period increased/decreased by more than the percentage increase/decrease of the other services category of the CPI-W section of the Consumer Price Index

of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.

- G. SUBMISSION OF INVOICES: All invoices shall be submitted within sixty days of contract term expiration for the initial contract period as well as for each subsequent contract renewal period. Any invoices submitted after the sixty-day period will not be processed for payment.
- H. OPERATING VEHICLES ON JAMES MADISON UNIVERSITY CAMPUS: Operating vehicles on sidewalks, plazas, and areas heavily used by pedestrians is prohibited. In the unlikely event a driver should find it necessary to drive on James Madison University sidewalks, plazas, and areas heavily used by pedestrians, the driver must yield to pedestrians. For a complete list of parking regulations, please go to www.jmu.edu/parking; or to acquire a service representative parking permit, contact Parking Services at 540.568.3300. The safety of our students, faculty and staff is of paramount importance to us. Accordingly, violators may be charged.
- I. COOPERATIVE PURCHASING / USE OF AGREEMENT BY THIRD PARTIES: It is the intent of this solicitation and resulting contract(s) to allow for cooperative procurement. Accordingly, any public body, (to include government/state agencies, political subdivisions, etc.), cooperative purchasing organizations, public or private health or educational institutions or any University related foundation and affiliated corporations may access any resulting contract if authorized by the Contractor.

Participation in this cooperative procurement is strictly voluntary. If authorized by the Contractor(s), the resultant contract(s) will be extended to the entities indicated above to purchase goods and services in accordance with contract terms. As a separate contractual relationship, the participating entity will place its own orders directly with the Contractor(s) and shall fully and independently administer its use of the contract(s) to include contractual disputes, invoicing and payments without direct administration from the University. No modification of this contract or execution of a separate agreement is required to participate; however, the participating entity and the Contractor may modify the terms and conditions of this contract to accommodate specific governing laws, regulations, policies, and business goals required by the participating entity. Any such modification will apply solely between the participating entity and the Contractor.

The Contractor will notify the University in writing of any such entities accessing this contract. The Contractor will provide semi-annual usage reports for all entities accessing the contract. The University shall not be held liable for any costs or damages incurred by any other participating entity as a result of any authorization by the Contractor to extend the contract. It is understood and agreed that the University is not responsible for the acts or omissions of any entity and will not be considered in default of the contract no matter the circumstances.

Use of this contract(s) does not preclude any participating entity from using other contracts or competitive processes as needed.

- J. SMALL BUSINESS SUBCONTRACTING AND EVIDENCE OF COMPLIANCE:
1. It is the goal of the Commonwealth that 42% of its purchases are made from small businesses. This includes discretionary spending in prime contracts and subcontracts. All potential offerors are required to submit a Small Business Subcontracting Plan. Unless the offeror is registered as a Department of Small Business and Supplier Diversity (SBSD)-certified small business and where it is practicable for any portion of the awarded contract to be subcontracted to other suppliers, the contractor is encouraged to offer such subcontracting opportunities to SBSD-certified small businesses. This shall not exclude SBSD-certified women-owned and minority-owned businesses when they have received SBSD small business certification. No offeror or subcontractor shall be considered a Small Business, a Women-Owned Business or a Minority-Owned Business unless

certified as such by the Department of Small Business and Supplier Diversity (SBSD) by the due date for receipt of proposals. If small business subcontractors are used, the prime contractor agrees to report the use of small business subcontractors by providing the purchasing office at a minimum the following information: name of small business with the SBSD certification number or FEIN, phone number, total dollar amount subcontracted, category type (small, women-owned, or minority-owned), and type of product/service provided. **This information shall be submitted to: JMU Office of Procurement Services, Attn: SWAM Subcontracting Compliance, MSC 5720, Harrisonburg, VA 22807.**

2. Each prime contractor who wins an award in which provision of a small business subcontracting plan is a condition of the award, shall deliver to the contracting agency or institution with every request for payment, evidence of compliance (subject only to insubstantial shortfalls and to shortfalls arising from subcontractor default) with the small business subcontracting plan. **This information shall be submitted to: JMU Office of Procurement Services, SWAM Subcontracting Compliance, MSC 5720, Harrisonburg, VA 22807.** When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the purchasing office at a minimum the following information: name of firm with the Department of Small Business and Supplier Diversity (SBSD) certification number or FEIN number, phone number, total dollar amount subcontracted, category type (small, women-owned, or minority-owned), and type of product or service provided. Payment(s) may be withheld until compliance with the plan is received and confirmed by the agency or institution. The agency or institution reserves the right to pursue other appropriate remedies to include, but not be limited to, termination for default.
 3. Each prime contractor who wins an award valued over \$200,000 shall deliver to the contracting agency or institution with every request for payment, information on use of subcontractors that are not Department of Small Business and Supplier Diversity (SBSD)-certified small businesses. When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the purchasing office at a minimum the following information: name of firm, phone number, FEIN number, total dollar amount subcontracted, and type of product or service provided. **This information shall be submitted to: JMU Office of Procurement Services, Attn: SWAM Subcontracting Compliance, MSC 5720, Harrisonburg, VA 22807.**
- K. AUTHORIZATION TO CONDUCT BUSINESS IN THE COMMONWEALTH: A contractor organized as a stock or nonstock corporation, limited liability company, business trust, or limited partnership or registered as a registered limited liability partnership shall be authorized to transact business in the Commonwealth as a domestic or foreign business entity if so required by Title 13.1 or Title 50 of the Code of Virginia or as otherwise required by law. Any business entity described above that enters into a contract with a public body shall not allow its existence to lapse or its certificate of authority or registration to transact business in the Commonwealth, if so required under Title 13.1 or Title 50, to be revoked or cancelled at any time during the term of the contract. A public body may void any contract with a business entity if the business entity fails to remain in compliance with the provisions of this section.
- L. PUBLIC POSTING OF COOPERATIVE CONTRACTS: James Madison University maintains a web-based contracts database with a public gateway access. Any resulting cooperative contract/s to this solicitation will be posted to the publicly accessible website. Contents identified as proprietary information will not be made public.
- M. CRIMINAL BACKGROUND CHECKS OF PERSONNEL ASSIGNED BY CONTRACTOR TO PERFORM WORK ON JMU PROPERTY: The Contractor shall obtain criminal background checks on all of their contracted employees who will be assigned to perform services on James Madison University property. The results of the background checks will be directed solely to the Contractor.

The Contractor bears responsibility for confirming to the University contract administrator that the background checks have been completed prior to work being performed by their employees or subcontractors. The Contractor shall only assign to work on the University campus those individuals whom it deems qualified and permissible based on the results of completed background checks. Notwithstanding any other provision herein, and to ensure the safety of students, faculty, staff and facilities, James Madison University reserves the right to approve or disapprove any contract employee that will work on JMU property. Disapproval by the University will solely apply to JMU property and should have no bearing on the Contractor's employment of an individual outside of James Madison University.

- N. INDEMNIFICATION: Contractor agrees to indemnify, defend and hold harmless the Commonwealth of Virginia, its officers, agents, and employees from any claims, damages and actions of any kind or nature, whether at law or in equity, arising from or caused by the use of any materials, goods, or equipment of any kind or nature furnished by the contractor/any services of any kind or nature furnished by the contractor, provided that such liability is not attributable to the sole negligence of the using agency or to failure of the using agency to use the materials, goods, or equipment in the manner already and permanently described by the contractor on the materials, goods or equipment delivered.
- O. ADDITIONAL GOODS AND SERVICES: The University may acquire other goods or services that the supplier provides than those specifically solicited. The University reserves the right, subject to mutual agreement, for the Contractor to provide additional goods and/or services under the same pricing, terms, and conditions and to make modifications or enhancements to the existing goods and services. Such additional goods and services may include other products, components, accessories, subsystems, or related services that are newly introduced during the term of this Agreement. Such additional goods and services will be provided to the University at favored nations pricing, terms, and conditions.
- P. SUBCONTRACTS: No portion of the work shall be subcontracted without prior written consent of the purchasing agency. In the event that the contractor desires to subcontract some part of the work specified herein, the contractor shall furnish the purchasing agency the names, qualifications and experience of their proposed subcontractors. The contractor shall, however, remain fully liable and responsible for the work to be done by its subcontractor(s) and shall assure compliance with all requirements of the contract.
- Q. PRIME CONTRACTOR RESPONSIBILITIES: The contractor shall be responsible for completely supervising and directing the work under this contract and all subcontractors that he may utilize, using his best skill and attention. Subcontractors who perform work under this contract shall be responsible to the prime contractor. The contractor agrees that he is as fully responsible for the acts and omissions of his subcontractors and of persons employed by them as he is for the acts and omissions of his own employees.
- R. CONFIDENTIALITY OF PERSONALLY IDENTIFIABLE INFORMATION: The contractor assures that information and data obtained as to personal facts and circumstances related to faculty, staff, students, affiliates, and research study participants will be collected and held confidential, during and following the term of this agreement, and will not be divulged without the individual's and the agency's written consent and only in accordance with federal law or the Code of Virginia. This shall include FTI, which is a term of art and consists of federal tax returns and return information (and information derived from it) that is in contractor/agency possession or control which is covered by the confidentiality protections of the Internal Revenue Code (IRC) and subject to the IRC 6103(p)(4) safeguarding requirements including IRS oversight. FTI is categorized as sensitive but unclassified information and may contain personally identifiable information (PII). Contractors who utilize, access, or store personally identifiable information as part of the performance of a contract are required to safeguard this information and immediately notify the agency of any breach or suspected breach in the security

of such information. Contractors shall allow the agency to both participate in the investigation of incidents and exercise control over decisions regarding external reporting. Contractors and their employees working on this project may be required to sign a confidentiality statement.

IX. METHOD OF PAYMENT

The contractor will be paid based on invoices submitted in accordance with the solicitation and any negotiations. James Madison University recognizes the importance of expediting the payment process for our vendors and suppliers; we request that our vendors and suppliers enroll in our bank's Comprehensive Payable options: either the Virtual Payables Virtual Card or the PayMode-X electronic deposit (ACH) to your bank account so that future payments are made electronically. Contractors signed up for the Virtual Payables process will receive the benefit of being paid Net 15. Additional information is available online at:

<http://www.jmu.edu/financeoffice/accounting-operations-disbursements/cash-investments/vendor-payment-methods.shtml>

X. PRICING SCHEDULE

The offeror shall provide a pricing structure based on hourly rates for all services included in the proposal. Offers should provide an onsite and offsite hourly rate for the range of personnel to provide labor under any resulting contract. Hourly rates should include all travel, incidentals, and miscellaneous expenses. The Contractor shall not be reimbursed for, nor will James Madison University purchase, any operational needs or expenses of the Contractor, which includes, but is not limited to, office supplies and equipment, computers and accessories, and office furniture.

Specify any associated charge card processing fees, if applicable, to be billed to the university.

XI. ATTACHMENTS

Attachment A: Offeror Data Sheet

Attachment B: Small, Women, and Minority-owned Business (SWaM) Utilization Plan

Attachment C: Standard Contract Sample

ATTACHMENT A

OFFEROR DATA SHEET

TO BE COMPLETED BY OFFEROR

1. **QUALIFICATIONS OF OFFEROR:** Offerors must have the capability and capacity in all respects to fully satisfy the contractual requirements.
2. **YEARS IN BUSINESS:** Indicate the length of time you have been in business providing these types of goods and services.

Years _____ Months _____

3. **REFERENCES:** Indicate below a listing of at least five (5) organizations, either commercial or governmental/educational, that your agency is servicing. Include the name and address of the person the purchasing agency has your permission to contact.

CLIENT	LENGTH OF SERVICE	ADDRESS	CONTACT PERSON/PHONE #
--------	-------------------	---------	---------------------------

4. List full names and addresses of Offeror and any branch offices which may be responsible for administering the contract.

5. **RELATIONSHIP WITH THE COMMONWEALTH OF VIRGINIA:** Is any member of the firm an employee of the Commonwealth of Virginia who has a personal interest in this contract pursuant to the [CODE OF VIRGINIA](#), SECTION 2.2-3100 – 3131?

[] YES [] NO

IF YES, EXPLAIN: _____

ATTACHMENT B

Small, Women and Minority-owned Businesses (SWaM) Utilization Plan

Offeror Name: _____ **Preparer Name:** _____

Date: _____

Is your firm a **Small Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes _____ No _____

If yes, certification number: _____ Certification date: _____

Is your firm a **Woman-owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes _____ No _____

If yes, certification number: _____ Certification date: _____

Is your firm a **Minority-Owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes _____ No _____

If yes, certification number: _____ Certification date: _____

Is your firm a **Micro Business** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes _____ No _____

If yes, certification number: _____ Certification date: _____

Instructions: *Populate the table below to show your firm's plans for utilization of small, women-owned and minority-owned business enterprises in the performance of the contract. Describe plans to utilize SWaMs businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc.*

Small Business: "Small business " means a business, independently owned or operated by one or more persons who are citizens of the United States or non-citizens who are in full compliance with United States immigration law, which, together with affiliates, has 250 or fewer employees, or average annual gross receipts of \$10 million or less averaged over the previous three years.

Woman-Owned Business Enterprise: A business concern which is at least 51 percent owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more women, and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWaM Program, all certified women-owned businesses are also a small business enterprise.**

Minority-Owned Business Enterprise: A business concern which is at least 51 percent owned by one or more minorities or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more minorities and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWaM Program, all certified minority-owned businesses are also a small business enterprise.**

Micro Business is a certified Small Business under the SWaM Program and has no more than twenty-five (25) employees **AND** no more than \$3 million in average annual revenue over the three-year period prior to their certification.

All small, women, and minority owned businesses must be certified by the Commonwealth of Virginia Department of Small Business and Supplier Diversity (SBSD) to be counted in the SWaM program. Certification applications are available through SBSD at 800-223-0671 in Virginia, 804-786-6585 outside Virginia, or online at <http://www.sbsd.virginia.gov/> (Customer Service).

RETURN OF THIS PAGE IS REQUIRED

ATTACHMENT B (CNT'D)
Small, Women and Minority-owned Businesses (SWaM) Utilization Plan

Procurement Name and Number: _____

Date Form Completed: _____

Listing of Sub-Contractors, to include, Small, Woman Owned and Minority Owned Businesses
for this Proposal and Subsequent Contract

Offeror / Proposer:

Firm

Address

Contact Person/No.

Sub-Contractor's Name and Address	Contact Person & Phone Number	SBSD Certification Number	Services or Materials Provided	Total Subcontractor Contract Amount (to include change orders)	Total Dollars Paid Subcontractor to date (to be submitted with request for payment from JMU)

(Form shall be submitted with proposal and if awarded, again with submission of each request for payment)

RETURN OF THIS PAGE IS REQUIRED

ATTACHMENT C



**COMMONWEALTH OF VIRGINIA
STANDARD CONTRACT**

Contract No. _____

This contract entered into this _____ day of _____, 20____, by _____ hereinafter called the "Contractor" and Commonwealth of Virginia, James Madison University called the "Purchasing Agency".

WITNESSETH that the Contractor and the Purchasing Agency, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:

SCOPE OF CONTRACT: The Contractor shall provide the services to the Purchasing Agency as set forth in the Contract Documents.

PERIOD OF PERFORMANCE: From _____ through _____

The contract documents shall consist of:

- (1) This signed form;
- (2) The following portions of the Request for Proposals dated _____:
 - (a) The Statement of Needs,
 - (b) The General Terms and Conditions,
 - (c) The Special Terms and Conditions together with any negotiated modifications of those Special Conditions;
 - (d) List each addendum that may be issued
- (3) The Contractor's Proposal dated _____ and the following negotiated modification to the Proposal, all of which documents are incorporated herein.
 - (a) Negotiations summary dated _____.

IN WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound thereby.

CONTRACTOR:

PURCHASING AGENCY:

By: _____
(Signature)

By: _____
(Signature)

(Printed Name)

(Printed Name)

Title: _____

Title: _____



October 24, 2023

ADDENDUM NO.: One

TO ALL OFFERORS

REFERENCE: Request for Proposal No: RFP# FDC-1189
Dated: October 2, 2023
Commodity: Sponsored Programs Evaluation Services
RFP Closing On: November 2, 2023

Please note the clarifications and/or changes made on this proposal program:

1. May offerors submit resumes for key management personnel requested under Section IV.H (page 2) as an annex?

Answer: Yes.

2. May offerors submit sample work products requested under Section IV.I (page 2) as an annex?

Answer: Yes.

3. Is the requirement of adding the heading to the top of each page expected for the sample work product? Should annexes be permissible, is the expectation to include the heading at the top of each page if the content carries over multiple pages?

Answer: It is not a requirement but it would be helpful.

4. Per Section 4 in the RFP, areas A and C require firm information, experience, and qualifications, and section H requires staffing information. Can you please confirm that these areas are separate sections or does JMU want these areas combined?

Answer: These are two separate questions and should have a separate response for each

5. What is the average value and duration for JMU evaluations and studies under this contract?

Answer: JMU does not have enough data to provide an answer to the value question. Most grants which utilize professional external evaluators are multi-year, 3 being average, however some projects run as long as 5 years.

6. Will JMU kindly share how many studies it expects to procure per year on average under this contract?

Answer: This is unknown and variable but probably fewer than 20 per year.

MSC 5720
752 Ott Street, Room 1042
Wine Price Building
Harrisonburg, VA 22807
Office of
PROCUREMENT SERVICES 540.568.3145 Phone
540.568.7935 Fax

7. Can JMU confirm if travel expenses included in the hourly rates should be for travel to JMU?

Answer: Most work is done remotely so travel to JMU or other locations would normally be minimal.

8. Should offerors expect travel to anywhere besides JMU and, if so, how will those costs be covered?

Answer: All costs for the contractor should be rolled into the hourly rate. Travel is not paid separately. Most work is done remotely so travel to JMU or other locations would normally be minimal.

9. At what point is the Contractor brought into the process? To what extent will the Contractor and faculty member submitting the proposal be working together in the planning phase?

Answer: Ideally with the use of pre-vetted contractors, the faculty or staff member would contact the contractor in the planning stages of the funding application to receive guidance on the evaluative aspects of the project in order to incorporate those elements into the proposal.

10. Is the evaluation ever considered a turn-key relationship, where the Contractor is acting as an independent third-party evaluator (or will the Contractor always be working with and/or advising a faculty)?

Answer: Ideally with the use of pre-vetted contractors, the faculty or staff member would contact the contractor in the planning stages of the funding application to receive guidance on the evaluative aspects of the project in order to incorporate those elements into the proposal.

11. Is there a time where the University would contract the Contractor without having had them involved with the development of the evaluation plan?

Answer: It is conceivable that a Contractor could be approached to provide services once a project is designed and funded.

12. What is the percentage of implementation program grants vs. research grant submissions?

Answer: Based on historical data this would break down to approximately 70% implementation or services projects and 30% projects which are categorized as research. Notably many implementation grants also have a research component.

Signify receipt of this addendum by initialing “*Addendum #1*” on the signature page of your proposal.

Sincerely,

Doug Chester
Buyer Senior
Phone: 540-568-4272