



perspective  
**GAINED**

PROPOSAL TO

**George Mason University**

FOR

**IT Consulting Services**

**BerryDunn**

100 Middle Street  
PO Box 1100  
Portland, ME 04104-1100

**Clinton E. Davies, Principal**

[cdavies@berrydunn.com](mailto:cdavies@berrydunn.com) / 207-541-2322

**David Houle, Senior Manager**

[dhoule@berrydunn.com](mailto:dhoule@berrydunn.com) / 207-541-2218

**Proposal Submitted On:**

January 22, 2021 before 2:00 p.m. EST in response to  
RFP Number GMU-1700-21



January 22, 2021

Ms. Michele Rogers, Senior Buyer  
Ms. Katherine Sirotin, Assistant Director  
Purchasing Department  
George Mason University  
4400 University Drive, Mailstop 3C5  
Fairfax, VA 22030

Dear Ms. Rogers and Ms. Sirotin:

Enclosed is Berry Dunn McNeil & Parker, LLC's (d/b/a BerryDunn's) proposal in response to George Mason University's (Mason's, the University's) Request for Proposals (RFP) Number GMU-1700-21 for IT Consulting Services.

We understand that Mason is creating a short-list of qualified vendors to provide future projects. BerryDunn would like to be considered for categories i, ii, and iv from Section XI.1.a of your RFP, specifically:

- Business Management Services
- Enterprise Applications Services
- Project, Program, and Portfolio Management Services

In addition, per Question 20 in Addendum 1 to the RFP, we also wish to be considered for Strategic IT Services.

The potential services you seek through this contract are a core focus of our Higher Education Management and Information Technology (IT) Consulting Practice and the work we do every day. Our strong team of higher education consulting professionals has worked with more than 140 colleges, universities, and multi-institution systems to assess the organizational, operational, technological, and financial aspects of their institutions to help improve operations and delivery of services, streamline processes, develop and set strategy, make best use of technology and other available resources, minimize risk, and create innovative solutions for complex business process issues. This includes work for research universities of similar size and complexity to Mason.

BerryDunn has also worked with hundreds of clients in the government, healthcare, and other industries to evaluate people, processes, and systems and identify opportunities that strengthen the value of their IT organization, resources, and technology investments.

As a Principal at BerryDunn, I am authorized to commit the firm to our proposal and any contractual agreement resulting from this RFP. I am also the individual who is authorized to

provide clarification, make decisions, and negotiate this contract on behalf of BerryDunn. Our proposal remains firm for a minimum of 90 days from the proposal due date of January 22, 2021.

Thank you for your consideration of our firm and our proposal. We are eager to work with Mason through this contract. We would be pleased to answer any questions you may have and are eager to discuss our services and qualifications with you. I can be reached (207) 541-2322 and [cdavies@berrydunn.com](mailto:cdavies@berrydunn.com).

We look forward to hearing from you soon.

Sincerely,

A handwritten signature in black ink, appearing to read "Clinton E. Davies", with a horizontal line underneath.

Clinton E. Davies  
Principal  
Berry Dunn McNeil & Parker, LLC (d/b/a BerryDunn)

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# Requests to Withhold Confidential Information from Public Release

In Table 1, we have provided a list of the information in our proposal that we request be held in confidence and not released publically.

**Table 1: Information We Request Be Held in Confidence**

Information We Request Be Protected	Section Where This Information Can Be Found in This Proposal	Why We Request This Information Be Kept Confidential
Exceptions to Sample Contract	Section 1.4	This information is sensitive to our firm, particularly as it relates to IT security matters.
References	Section 2	We value our clients’ privacy and prefer to not release their names and contact information publically.  In addition, the release of our customer information could be used by a competitor to obtain an advantage that could be detrimental to our business.
Examples of Recent Projects	Section 3.7	We value our clients’ privacy and prefer to keep the work we conducted on their behalf confidential, particularly where IT security matters are concerned.  In addition, the release of our customer information could be used by a competitor to obtain a competitive advantage that could be detrimental to our business.
Our Experience and Qualifications – client list	Section 4	We value our clients’ privacy and prefer to keep the work we conducted on their behalf confidential, particularly where IT security matters are concerned.  In addition, the release of our customer information could be used by a competitor to obtain a competitive advantage that could be detrimental to our business.

If Mason has any questions about these requests, we would be happy to discuss.

# 1. Procedural Information

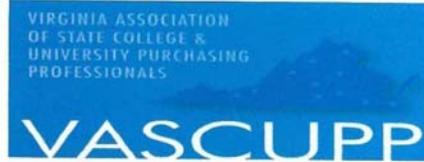
On the following pages, we have provided the following required documentation:

- A signed cover page (page 1 of the RFP)
  - We acknowledge receipt of Addendum 1 to the RFP, issued on December 9, 2020. We have not included Addendum 1 in this proposal as it was not required to be signed and returned.
- Attachment A - Small Business Subcontracting Plan (pages 11 - 12 of the RFP)
- Our payment preference (per Section XVI of the RFP)
- Our exceptions to Mason's sample contract (Attachment B of the RFP)

# 1.1 Signed Cover Page



Purchasing Department  
4400 University Drive, Mailstop 3C5  
Fairfax, VA 22030  
Voice: 703.993.2580 | Fax: 703.993.2589  
<http://fiscal.gmu.edu/purchasing/>



## REQUEST FOR PROPOSALS GMU-1700-21

**ISSUE DATE:** November 13, 2020  
**TITLE:** IT Consulting Services  
**PRIMARY PROCUREMENT OFFICER:** Michele Rogers, Senior Buyer, [mroger19@gmu.edu](mailto:mroger19@gmu.edu)  
**SECONDARY PROCUREMENT OFFICER:** Katherine Sirotin, Assistant Director, [ksirotin@gmu.edu](mailto:ksirotin@gmu.edu)

**QUESTIONS/INQUIRIES:** E-mail all inquiries to both Procurement Officers listed above, no later than 4:00 PM EST on December 4, 2020. All questions must be submitted in writing. Responses to questions will be posted on the Mason Purchasing Website by 5:00 PM EST on December 10, 2020. Note: Questions must be submitted in WORD format. Also see section III. COMMUNICATION, herein.

**PROPOSAL DUE DATE AND TIME:** January 22, 2021 @ 2:00 PM EST. SEE SECTION XIII.A.1 FOR DETAILS ON ELECTRONIC PROPOSAL SUBMISSION.

**In Compliance With This Request For Proposal And To All The Conditions Imposed Therein And Hereby Incorporated By Reference, The Undersigned Offers And Agrees To Furnish The Goods/Services In Accordance With The Attached Signed Proposal Or As Mutually Agreed Upon By Subsequent Negotiations.**

Name and Address of Firm:

**Legal Name:** Berry Dunn McNeil & Parker, LLC  
**DBA:** BerryDunn  
**Address:** 100 Middle Street  
Portland, Maine 04101  
**FEI/FIN No.** 01-0523282  
**Fax No.** (207) 774-2375  
**Email:** cdavies@berrydunn.com

**Date:** January 22, 2021  
**By:**   
**Signature**  
**Name:** Clinton E. Davies  
**Title:** Principal  
**Telephone No.** (207) 541-2322

SWaM Certified: Yes: \_\_\_\_\_ No:  (See Section VII. SWaM CERTIFICATION for complete details).

SWaM Certification Number: \_\_\_\_\_

This public body does not discriminate against faith-based organizations in accordance with the *Governing Rules, § 36* or against a Bidder/Offeror because of race, religion, color, sex, national origin, age, disability, or any other prohibited by state law relating to discrimination in employment.

## 1.2 Attachment A – Small Business Subcontracting Plan

### **ATTACHMENT A SMALL BUSINESS SUBCONTRACTING PLAN TO BE COMPLETED BY OFFEROR**

It is the goal of the Commonwealth that over 42% of its purchases be made from small businesses. All potential offerors are required to include this document with their proposal in order to be considered responsive.

**Small Business:** "Small business (including micro)" means a business which holds a certification as such by the Virginia Department of Small Business and Supplier Diversity (DSBSD) on the due date and time for proposals. This shall also include DSBSD certified women- owned and minority-owned businesses and businesses with DSBSD service disabled veteran owned status when they also hold a DSBSD certification as a small business on the proposal due date. Currently, DSBSD offers small business certification and micro business designation to firms that qualify.

Certification applications are available through DSBSD online at [www.SBSD.virginia.gov](http://www.SBSD.virginia.gov) (Customer Service).

**Offeror Name:** Berry Dunn McNeil & Parker, LLC db/a BerryDunn

**Preparer Name:** Clinton E. Davies **Date:** January 22, 2021

**Who will be doing the work:**  I plan to use subcontractors  I plan to complete all work [Please refer to Section 3.10 of our proposal for more information.](#)

#### **Instructions**

- A. If you are certified by the DSBSD as a micro/small business, complete only Section A of this form.
- B. If you are not a DSBSD-certified small business, complete Section B of this form. For the proposal to be considered and the offeror to be declared responsive, the offeror shall identify the portions of the contract that will be subcontracted to DSBSD certified small business for the initial contract period in relation to the offeror's total price for the initial contract period in Section B.

#### **Section A**

If your firm is certified by the DSBSD provide your certification number and the date of certification.

**Certification Number:** \_\_\_\_\_ **Certification Date:** \_\_\_\_\_

#### **Section B**

If the "I plan to use subcontractors" box is checked, populate the requested information below, per subcontractor to show your firm's plans for utilization of DSBSD-certified small businesses in the performance of this contract for the initial contract period in relation to the offeror's total price for the initial contract period. Certified small businesses include but are not limited to DSBSD-certified women-owned and minority-owned businesses and businesses with DSBSD service disabled veteran-owned status that have also received the DSBSD small business certification. Include plans to utilize small businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc. It is important to note that these proposed participation will be incorporated into the subsequent contract and will be a requirement of the contract. Failure to obtain the proposed participation dollar value or percentages may result in breach of the contract.

#### **B. Plans for Utilization of DSBSD-Certified Small Businesses for this Procurement**

##### **Subcontract #1**

**Company Name:** \_\_\_\_\_ **SBSD Cert #:** \_\_\_\_\_  
**Contact Name:** \_\_\_\_\_ **SBSD Certification:** \_\_\_\_\_  
**Contact Phone:** \_\_\_\_\_ **Contact Email:** \_\_\_\_\_  
**Value % or \$ (Initial Term):** \_\_\_\_\_ **Contact Address:** \_\_\_\_\_  
**Description of Work:** \_\_\_\_\_

##### **Subcontract #2**

**Company Name:** \_\_\_\_\_ **SBSD Cert #:** \_\_\_\_\_  
**Contact Name:** \_\_\_\_\_ **SBSD Certification:** \_\_\_\_\_  
**Contact Phone:** \_\_\_\_\_ **Contact Email:** \_\_\_\_\_  
**Value % or \$ (Initial Term):** \_\_\_\_\_ **Contact Address:** \_\_\_\_\_  
**Description of Work:** \_\_\_\_\_

**Subcontract #3**

Company Name: \_\_\_\_\_ SBSB Cert #: \_\_\_\_\_  
Contact Name: \_\_\_\_\_ SBSB Certification: \_\_\_\_\_  
Contact Phone: \_\_\_\_\_ Contact Email: \_\_\_\_\_  
Value % or \$ (Initial Term): \_\_\_\_\_ Contact Address: \_\_\_\_\_  
Description of Work: \_\_\_\_\_

**Subcontract #4**

Company Name: \_\_\_\_\_ SBSB Cert #: \_\_\_\_\_  
Contact Name: \_\_\_\_\_ SBSB Certification: \_\_\_\_\_  
Contact Phone: \_\_\_\_\_ Contact Email: \_\_\_\_\_  
Value % or \$ (Initial Term): \_\_\_\_\_ Contact Address: \_\_\_\_\_  
Description of Work: \_\_\_\_\_

**Subcontract #5**

Company Name: \_\_\_\_\_ SBSB Cert #: \_\_\_\_\_  
Contact Name: \_\_\_\_\_ SBSB Certification: \_\_\_\_\_  
Contact Phone: \_\_\_\_\_ Contact Email: \_\_\_\_\_  
Value % or \$ (Initial Term): \_\_\_\_\_ Contact Address: \_\_\_\_\_  
Description of Work: \_\_\_\_\_

## 1.3 Payment Preference

In response to Section XVI of your RFP, BerryDunn prefers Option 3 for our payment terms/method of payment.

**Table 2: BerryDunn’s Preferred Payment Terms/Method of Payment**

BerryDunn’s Preference	Mason’s Payment Terms/Method of Payment Options
	<p><b>Option #1</b> - Payment to be mailed in 10 days-Mason will make payment to the vendor under 2%10 Net 30 payment terms. Invoices should be submitted via email to the designated Accounts Payable email address which is <a href="mailto:acctpay@gmu.edu">acctpay@gmu.edu</a>.</p> <p>The 10 day payment period begins the first business day after receipt of proper invoice or receipt of goods, whichever occurs last. A paper check will be mailed on or before the 10th day.</p>
	<p><b>Option #2</b> - To be paid in 20 days. The vendor may opt to be paid through our Virtual Payables credit card program. The vendor shall submit an invoice and will be paid via credit card on the 20th day from receipt of a valid invoice. The vendor will incur standard credit card interchange fees through their processor. All invoices should be sent to:</p> <p>George Mason University            Accounts Payable Department            4400 University Drive, Mailstop 3C1            Fairfax, Va. 22030            Voice: 703.993.2580   Fax: 703.993.2589            e-mail: <a href="mailto:AcctPay@gmu.edu">AcctPay@gmu.edu</a></p>
	<p><b>Option #3</b> - Net 30 Payment Terms. Vendor will enroll in Paymode-X where all payments will be made electronically to the vendor’s bank account. For additional information or to sign up for electronic payments, go to <a href="http://www.paymode.com/gmu">http://www.paymode.com/gmu</a>. There is no charge to the vendor for enrolling in this service.</p>

## 1.4 Exceptions to Sample Contract

**CONFIDENTIAL**

In accordance with Section IV of your RFP (Final Contract), we have reviewed your RFP and we accept Mason's terms and conditions with the following exceptions:

**REDACTED**

REDACTED

If we are selected to receive a contract award, we would appreciate the opportunity to discuss and negotiate the above items with Mason during the contract execution process.

## 2. References

RFP Section XIII.B.2: References: No fewer than three (3), preferably from other comparable higher education institutions to which your firm is/has provided IT related support services and consulting services which are similar in size and scope to that which has been described herein, that demonstrate the offeror's qualifications.

*Our clients depend on us to deliver quality products and services. We take the quality of our work seriously and work to exceed your expectations for the quality and timeliness of our communications, service delivery, and final work products.*

In this section, we have provided reference information for three projects that demonstrate our experience conducting work similar to your needs. These projects also demonstrate the level of customization that we provide to clients in order to best meet their needs.

We encourage you to contact our references to inquire about our performance and our clients' satisfaction with the services we have provided.

## CONFIDENTIAL

BerryDunn Reference: REDACTED	
Client Name	REDACTED
Contact Name, Title, Phone Number, and Email Address	REDACTED
Nature of the Projects	REDACTED

BerryDunn Reference: REDACTED	
Client Name	REDACTED
Contact Name, Title, Phone Number, and Email Address	REDACTED
Nature of the Projects	REDACTED

BerryDunn Reference: REDACTED	
Client Name	REDACTED
Contact Name, Title, Phone Number, and Email Address	REDACTED
Nature of the Project	REDACTED

# 3. Our Approach To Providing Services and Fulfilling Mason’s Objectives

RFP Section XIII.B.3: A written narrative describing the offeror’s approach toward fulfilling the objectives and providing services sought by Mason. In addition, offeror shall identify the terms of any quality guarantee(s) offered. Address points outlined in Section XI, Statement of Needs.

## 3.1 Our Experience and Alignment with Mason’s Needs

RFP Section XI.1.a. Provide detailed corporate competencies/experience serving one or more of the technologies and capabilities listed below:

In this section, we have described our approach to fulfilling the objectives and providing the services sought by Mason. **As shown in Table 4, below, we wish to be considered for categories i, ii, and iv from Section XI.1.a of your RFP. In addition, per Question 20 in Addendum 1 to the RFP, we also wish to be considered for Strategic IT Services.**

As noted in the RFP, BerryDunn will serve Mason on special projects as a technology advisor and expert when requested and as needed. As appropriate for each project, we will provide a report(s) to Mason summarizing options and providing recommendations.

**Table 4: Service Categories For Which BerryDunn is Applying**

Services Sought by Mason	Categories For Which BerryDunn Wishes to be Considered
<b>i. Business Management Services</b> to include projects such as Operational Assessments, Business Process Improvements, Benchmarking, IT Strategic Planning, and Implementation Services including Technical Change Management	<input checked="" type="checkbox"/>
<b>ii. Enterprise Applications Services</b> to include Programming, Business Analysis, Software Solutions Architecture, Enterprise Resource Planning (ERP) Analysis and Development, Salesforce Development, Database Administration, and Website Development	<input checked="" type="checkbox"/>
<b>iii. Enterprise Infrastructure Services</b> to include Cisco Network and Connectivity Technologies, Microsoft Enterprise Support Services, Virtualization, Cloud Architecture and Engineering, Systems Administration, and Voice and Video Collaboration	<input type="checkbox"/>
<b>iv. Project, Program, and Portfolio Management Services</b> to include Resource Capacity Planning, Resource Sourcing and Management, Time Management, Demand Management, Reporting Services, and Integration	<input checked="" type="checkbox"/>
<b>v. Security Services</b> including Threat Management, Perimeter Security, Internal Network Security, Endpoint Security, Application Security, and Data Security	<input type="checkbox"/>
<b>Addendum 1, Question 20: Strategic IT Services</b> to include guidance and expertise on higher education-specific IT governance, data governance, privacy, and information security strategic initiatives like program strategy assessments, risk assessments, and business continuity and disaster recovery planning	<input checked="" type="checkbox"/>

We have been providing professional consulting services for 35 years and use proven methodologies and tools to perform our work. Our consulting team has extensive experience working on large and complex project engagements that are highly visible (both within the organization and externally). This includes work for institutes of higher education and state and local government agencies.

In the following sections, we have briefly described some of our experience providing services in the following categories:

- Business Management Services
- Enterprise Applications Services
- Project, Program, and Portfolio Management Services
- Strategic IT Services

***A more comprehensive listing of our core services can be found in Section 3.5 of this proposal.***

### 3.1.1 Summary of Our Experience Providing Business Management Services

Table 5 provides a brief overview of some of our business management-related services:

**Table 5: Overview of BerryDunn’s Business Management Services**

Service Provided	Description
Strategic Technology Planning	BerryDunn has spent more than three decades assessing IT needs to best align with organizational strategy, helping to ensure that business goals drive technology. We will work collaboratively with your staff, administration, IT department, and other key stakeholders to set strategic direction, identify objectives, and sequence projects, either to respond to urgent needs or over a multiple-year planning horizon.
IT Business Process Review, Mapping, and Improvement	BerryDunn developed its business process mapping methodology based on practices and tools from Six Sigma and Lean, such as defining the voice of the customer, identifying waste, and leveraging elements of other business process improvement methodologies. We guide our clients through business process design, analysis, and improvement efforts, based on client needs in conjunction with system evaluations and replacements. Collaboration is central to this approach, which builds consensus among project stakeholders and helps to proactively identify opportunities and risks.
Organizational Development Services	BerryDunn has been developing and delivering a variety of organizational development services for over 30 years, including coaching, facilitation, and training. We provide said services by helping to develop and implement strategic plans, support leadership and managerial advancement, refine

Service Provided	Description
	processes, and prepare and reinforce change management for academic IT organizations.
Organizational Change Management	<p>BerryDunn utilizes Prosci®'s proven change management methodology across all of our projects. A central focus of the Prosci® change management approach is the belief that, in order for change to be realized in an organization, individuals must be able to understand the change being sought and why it is in their best interest to change. BerryDunn's change management methodology for project initiatives involves three key stages:</p> <ol style="list-style-type: none"> <li>1. <b>Preparing for Change</b> begins with the development of an agreed-upon project work plan, based on input from client stakeholders on the existing environment.</li> <li>2. <b>Managing Change</b> involves overseeing assigned roles and tasks, providing training and coaching, using tools effectively, and executing a clear communication plan.</li> <li>3. <b>Reinforcing Change</b> involves evaluating action plans, reviewing the sustainability of change management activities, and promoting individual and team successes.</li> </ol>

### 3.1.2 Summary of Our Experience Providing Enterprise Applications Services

Per Question 135 in Addendum 1, the potential exists for the Enterprise Applications Services category to include consulting services such as system requirements definition, system needs assessments, system selection, and implementation oversight.

One of our core specialties is providing a range of IT- and management-related services across the lifecycle of enterprise-level systems. Our team has broad knowledge of enterprise solutions in higher education and the trends that are driving the industry.

Our services include:

- Conducting software **feasibility, fit-gap, and needs** assessments
- **Documenting, mapping, and re-engineering business processes** to make best use of new or existing technology, improve data quality and reporting, and/or identify ways to improve the effectiveness and efficiency of the services provided
- **Designing the desired future state**
- **Developing functional and technical software requirements**
- **Developing Requests for Proposals (RFPs) and Requests for Information (RFIs)**
- **Planning for, selecting, and procuring new systems**, including developing a business case, evaluating proposals, comparing products and cost, coordinating and leading

vendor demonstrations, facilitating the scoring process, and leading contract negotiations

- Providing **project management and implementation oversight**, including holding both the vendor and the client organization accountable, and providing monitoring, workflow redesign, testing, training, and issue resolution
- Assessing readiness and **managing the organizational and people side of change**
- Facilitating **interface design sessions** and technical decision meetings
- Analyzing data and **assessing data management needs**
- **Evaluating integration needs** with other systems
- Conducting **Independent Verification & Validation (IV&V) and Quality Assurance (QA)** for software implementations
- Conducting privacy, security, and risk assessments to help clients comply with state and federal privacy laws and **strengthen the security of information systems**

Our experience with enterprise systems includes, but is not limited to:

- Budget and Planning
- eProcurement
- Enterprise Content Management (ECM)
- Enterprise Resource Planning (ERP)
- Electronic Health Record (EHR)
- Facilities Management
- IT Service Management
- Learning Management
- Student Information

Our experience includes cloud-hosted versus self-hosted solutions.

We have worked with colleges/universities that have additional applications and customizations that have been put in place over the years as 'add-ons' to the system. This knowledge will be valuable to Mason as we work with you on initiatives related to your enterprise systems.

In addition, a core function of our methodology is to understand the organization's disparate data sources and enterprise functions that exist outside of the core enterprise system function. Identifying these integration points is critical to improving system functionality and streamlining processes.

Drawing from our experience, we know what is realistic and achievable, and will share this knowledge and perspective with you. We have seen what makes for successful and failed system assessments, selections, implementations, and adoption. This strategic and tactical

perspective will help Mason with its enterprise system initiatives. Our experience allows us to anticipate and address risks that can occur during these projects and bring efficiencies, best practices, and insight to your projects.

### 3.1.3 Summary of Our Experience Providing Project, Program, and Portfolio Management Services

Table 6 provides a brief overview of some of our project-, program-, and portfolio-related services:

**Table 6: Overview of BerryDunn’s Project, Program, and Portfolio-Related Services**

Service Provided	Description
<p style="text-align: center;"><b>IT Project Management</b></p>	<p>BerryDunn’s clients benefit from our collaborative decision-making process in technology planning, which includes establishing a project timeline, implementation strategy, data conversion solutions, and establishing team membership. Drawing from our experience, we know what is realistic and achievable, and share this knowledge and perspective with our clients to pave the way for a smooth implementation.</p> <p>We understand that involving stakeholders throughout the planning process increases stakeholders’ ownership and buy-in. BerryDunn’s IT and project management experts help clients in the following ways:</p> <ul style="list-style-type: none"> <li>• Build consensus among stakeholders</li> <li>• Provide ongoing project monitoring</li> <li>• Present monthly status reports</li> <li>• Attend monthly executive team meetings</li> <li>• Provide configuration and analysis support</li> <li>• Perform user acceptance testing</li> <li>• Assist with training oversight</li> <li>• Assess go-live readiness</li> </ul>
<p style="text-align: center;"><b>IT Service Management</b></p>	<p>BerryDunn’s many projects include assessing and/or designing IT service delivery models and supporting technologies. In this work, we help clients optimize their technology investments and resources to improve service design and delivery, operational efficiency, and customer service.</p> <p>As a result of our collaborative project approach, our clients are better positioned to plan, communicate, organize, and deliver IT services, and manage the costs of providing these services. Our services are grounded in industry best practices and designed to advance the client’s overall mission, vision, goals, and strategy.</p>

### 3.1.4 Summary of Our Experience Providing Strategic IT Services

Table 7 provides a brief overview of some of our strategic IT-related services:

**Table 7: Overview of BerryDunn’s Strategic IT-Related Services**

Service Provided	Description
<p style="text-align: center;"><b>IT Security</b></p>	<p>BerryDunn provides cybersecurity, information systems assurance, and advanced security services for clients that demand a high level of security and performance from their information systems, including state and local government agencies, state lotteries, third-party administrators, financial institutions, healthcare institutions, colleges and universities, and corporate entities. Our team is dedicated to helping government entities improve their cybersecurity profile, achieve regulatory compliance, and adopt information security programs to support organization and business objectives. The following are some of the services we provide:</p> <ul style="list-style-type: none"> <li>• IT audit and risk assessments</li> <li>• Vulnerability assessments and penetration testing</li> <li>• Information security program review and development</li> <li>• Incidence response and disaster recovery planning</li> <li>• Change management</li> <li>• Virtual CISO</li> <li>• Cybersecurity maturity development and assessment</li> <li>• Regulatory compliance assessments</li> <li>• Training and development</li> </ul>
<p style="text-align: center;"><b>Data Management and Governance</b></p>	<p>BerryDunn assists clients with data management, often as part of an enterprise system selection and implementation projects. Data management questions that we help clients address in planning for new enterprise systems, include the following:</p> <ul style="list-style-type: none"> <li>• <b>Conversion and data migration</b> – What data do you bring over into new system(s) and what data do you leave behind?</li> <li>• <b>Interfaces and integrations</b> – How is your current data structured and how will it connect with new enterprise system(s)?</li> <li>• <b>Storage, retention, and archiving</b> – What are the client’s policies and practices and how will these be defined for new system(s)?</li> <li>• <b>Data stewardship</b> – Which individuals are responsible for promoting appropriate use of data through planning, policy, and protocols?</li> <li>• <b>Data governance</b> – How can the client mitigate important risks associated with the storage and management of data?</li> <li>• <b>Data analytics</b> – How can the client improve their data reporting and outcomes?</li> </ul> <p>BerryDunn helps clients identify and document specific information about their data, including: where it resides, its structures, its quality, and who has data</p>

Service Provided	Description
	<p>access and responsibility. Our services can include the development of a data catalog, data inventory, and data quality analysis.</p> <p>Our services also include providing assistance in the development of a data governance structure that can support the client's immediate and long-term data management needs. Data governance assists in maintaining data integrity, controlling access, and securing data storage for the client's data assets. Effective data governance relies on data management, whereby an organization identifies what data exists currently and needs to exist in the future. Effective data governance also defines roles and responsibility for managing data and assigns accountability to specific groups or individuals through a strong data stewardship model.</p>

## 3.2 Our Approach to Provide IT Services to Mason

RFP Section XI.1.b. Describe approach and methodology to providing IT service delivery to George Mason University. Include how your firm would manage the scope of projects and how your firm aligns with current best practices.

### 3.2.1 Overview of Our Approach and Methodology

When a request for proposals (RFP) or statement of work (SOW) is issued by Mason, we will carefully review the document and any addenda in their entirety to confirm our ability to meet the project's needs. If appropriate, we will speak with the designated Mason representative to clarify requirements. We will then develop a proposed approach, strategy, budget, and staffing plan that meet the needs and timeline of the project. Our projects typically involve a combination of on-site and off-site work and include short-term or multi-year engagements.

While we have several proven methodologies that we apply to our consulting projects, our experience has shown that each consulting project is unique. In order to best align our project approach with Mason's needs, we will develop a custom approach that is carefully tailored to the needs set forth in Mason's RFP/SOW. While our project tasks may adjust to meet your needs, our dedication to client service and our quality assurance procedures do not waiver.

We will consider the nature of the work to be conducted, the level of commitment requested (e.g., full-time, part-time, on-site, off-site), the number of professionals needed, and the timing and duration of the project in our determination of staff assignments. We will then work to propose an individual or a team based on our level of fit to your needs and availability to conduct the work for the full duration of the project.

The specific project management-related deliverables will be developed in accordance with the scope of work, needs, and expectations for the engagement.

Upon notification of project award, we will facilitate a meeting with Mason to review the proposed work plan and timeline, clarify goals and objectives, and discuss any requested modifications prior to finalizing a contract.

Once we have a signed contract, our project manager manages the project according to the agreed-upon work plan, schedule, and budget. We have an excellent track record of meeting deadlines and, as a standard practice, we only allow changes to the timeline, scope, or project fees based on changes that are documented and approved by the client. BerryDunn will regularly provide status updates against the agreed-upon plan.

Prior to the commencement of any project engagement, our team will work closely with Mason to properly plan and prepare for our assessment, including hosting an initial introductory call to introduce our team, learn about Mason's team, and discuss the project.

As a result of our extensive experience providing IT consulting services to academic institutions, we are skilled at developing realistic timelines that take the client's specific needs and common scheduling challenges into account.

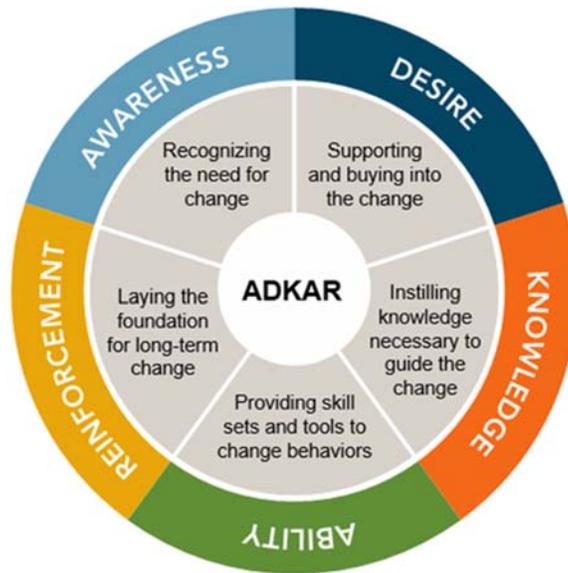
### 3.2.1.1 Our Work is Informed by Change Management Principles

In our experience, *deliberate change management* is one of the most critical factors determining the success of an initiative that considers alternatives to the status quo and how work will be performed. Stakeholders' willingness to adopt new processes, tools, and responsibilities plays a significant role in the success—or failure—of new initiatives.

Our expertise includes managing change to implement the cultural and structural adjustments required to support new structure, processes, tools, and strategies. We have adopted the Prosci® change management methodology and members of our proposed team are Prosci® Certified Change Practitioners. BerryDunn has successfully used ADKAR, Prosci's® proven change management methodology as shown in Exhibit A, which includes:

- Creating **A**wareness of the need for change
- Building **D**esire to support the change
- Delivering **K**nowledge of how to change
- Increasing **A**bility to demonstrate skills and behaviors
- Committing to **R**einforcement to make the change stick

## Exhibit A: Prosci® ADKAR Change Management Approach



We offer clients a wide range of change management consulting services to help with potential challenges. As appropriate, we work with our clients to communicate and educate stakeholders about future changes (in advance of the change taking place), and provide a structured process to manage resistance. Additionally, our team proactively manages change by involving stakeholders at key stages throughout the process to build support and buy-in for key decisions.

As appropriate, we will utilize Prosci's® change management methodology to help you prepare for, manage, and reinforce change resulting from any projects we conduct together. This preparedness can provide additional value in the implementation process, as your project stakeholders embrace change and become vested in your initiative.

### 3.2.2 Our Best Practices

First and foremost, we are committed to our clients' success. BerryDunn consultants are equipped to and help our clients achieve their organizational and project goals. We have a comprehensive new hire and subcontractor orientation process, which enables team members to get up to speed quickly on BerryDunn's firm culture, obtain the tools needed to perform their work effectively, and become integrated into the project team.

We are experienced managing multiple, concurrent project efforts of varying sizes and scope. BerryDunn uses Project Management Institute® (PMI®) best practices and quality assurance processes to develop and manage agreed-upon project schedules, plans, and deliverables for our client engagements.

BerryDunn is an independent consulting and certified public accounting firm. We are required to comply with the same stringent regulations and requirements that have been established for CPA firms, including requirements associated with quality assurance (QA) and control, independence, professional development, and integrity.

Our professional services—including our QA and control procedures—comply with the regulations of the American Institute of Certified Public Accountants (AICPA), Public Company Accounting Oversight Board (PCAOB), the Federal Deposit Insurance Corporation (FDIC), and other regulatory bodies. As a client of BerryDunn, Mason can expect the same dedication to quality and integrity.

### 3.2.2.1 Our Commitment to Continuing Professional Education

As a consulting and certified public accounting firm, all of our professional personnel are required to complete at least 120 hours of continuing professional education (CPE) every three years, which contributes to their consulting, information technology, management, and accounting (if applicable) proficiency. Members of our consulting group frequently exceed this requirement by completing both technical and industry-specific educational programs each year.

We regularly seek out areas of professional education and/or certifications that will meet the needs of our clients. Further, individuals designated as having specialized industry experience and expertise are encouraged to maintain their proficiency by joining appropriate professional associations and attending external professional education programs.

Our commitment to staff development goes beyond simple training; our dedicated team, led by our director of Learning and Development, plans and develops internal curriculum based on industry trends and identified development needs. This curriculum is delivered in the form of dedicated training events for all levels and is augmented by outside training events.

### 3.2.2.2 Our Consulting Quality Management Program

BerryDunn has an internal Consulting Quality Management (CQM) program. The goal of CQM is to have effective quality management in order to help ensure high-quality consulting services to our clients. We evaluate our work for our clients in comparison with the agreed-upon scope of work, how our work meets client needs, and the quality, clarity, and presentation of our client deliverables. We also confirm with our clients that they received value from our services.

Our team takes the quality of our work seriously and will work to exceed Mason's expectations of the quality and timeliness of our communications, service delivery, and final work products. We strive to help assure quality by understanding your expectations, developing a reasonable and achievable project approach, gaining concurrence on project tasks and timing, and using appropriate staff for each engagement.

This approach to quality management is applicable to BerryDunn's performance and the deliverables and related documentation we produce. It is consistent with standards developed by the Project Management Institute® (PMI®).

### 3.2.2.3 Our Industry Involvement and National Perspective on Best Practices

We are actively involved in industry- and topic-specific conferences across the country, which enables us to provide our clients with current information on issues of importance.

We maintain a current working knowledge of IT trends, controls, and security challenges, direction in organization and management of education, and changes in accounting and financial reporting affecting colleges and universities.

We have a national perspective on higher education best practices through our dedication to colleges and universities across the country, as well as our participation in relevant associations and events, including but not limited to:

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**AICPA** – American Institute of Certified Public Accountants

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**ASBO** – International Association of School Business Officers

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**EDUCAUSE** – Nationally recognized leader for IT in Higher Education

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**ISACA** – Information Systems Audit and Control Association

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**ISO** – International Organization for Standardization

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**ITIL** – Information Technology Infrastructure Library

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**NACUBO** – National Association of Colleges and University Business Officers

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**NASCIO** – National Association of State Chief Information Officers

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Our consultants routinely conduct presentations and speak at industry events.

#### 3.2.2.4 We Are Independent and Objective Advisors

*Central to BerryDunn's identity is the preservation of our independence and objectivity.*

A key differentiator that BerryDunn brings to this contract is our **independence from the vendor community**. Our team has many years of IT consulting experience, but our firm does not sell, develop, or provide staff augmentation services for software, hardware, or implementation vendors.

Further, we do not have any preferred vendors and you will not find our name listed as partners, affiliates, or sponsors of any software.

This allows us to provide **truly objective services** and means you can be assured that BerryDunn's team will only work in **Mason's best interests at all times**.

### 3.3 Our Team Has the Skills and Experience Needed

RFP Section XI.1.c. Provide examples of the names, qualifications, and experience in personnel to be assigned to George Mason University. Designate who would be assigned as the primary relationship manager for this account. The University reserves the right to accept or reject any proposed or assigned consultant, without cause, at any time during the duration of the contract.

#### 3.3.1 Introduction to Our Team

BerryDunn is committed to providing Mason with a qualified team for every engagement. Mason can be confident that we will have the right people in the right positions for project success.

We have a strong team of higher education management and IT consulting professionals who will collaborate with you to support your needs. We have the skills, experience, and subject matter and industry knowledge to successfully fulfill your potential project needs.

Our core team members have relevant technical professional certifications, including:

- Certified Associate in Project Management (CAPM)
- Certified Information Systems Auditor (CISA)
- Certified in COBIT 5 Foundation
- Certified Process Professional (CPP)
- Certified in Risk and Information Systems Control (CRISC)
- ITIL Foundation Certificate in IT Service Management
- Lean Six Sigma
- Project Management Professional (PMP)
- Prosci® Certified Change Practitioner (CCP)

Our team members will be carefully selected for each project based on factors such as their strengths, experience, subject matter expertise, industry knowledge, certifications, and education.

### **3.3.2 Primary Relationship Manager for This Account**

Clinton E. Davies, Principal, will be the primary relationship manager for this account. Clint is a Principal at BerryDunn and the leader of our Higher Education Management and IT Consulting Practice. He has more than 30 years of experience assisting clients—including colleges, universities, and state systems—to strengthen organizational structure, staffing, operations, service catalog and delivery, strategic direction and alignment, business processes, enterprise systems, infrastructure, governance, and information security.

Clint is authorized to commit BerryDunn to this proposal and any contract resulting from this RFP. He is also the individual who is authorized to provide clarification, make decisions, and negotiate a contract on behalf of BerryDunn. His contact information is:

Clinton E. Davies, Principal  
BerryDunn  
100 Middle Street  
PO Box 1100  
Portland, ME 04104-1100  
Telephone: (207) 541-2322  
Email: [cdavies@berrydunn.com](mailto:cdavies@berrydunn.com)

### 3.3.3 Proposed Team Organization and Resumes

#### 3.3.3.1 Organizational Chart

Below, we have provided an organizational chart for our key team members who we anticipate would provide services to Mason.



#### 3.3.3.2 Resumes

On the following pages we have provided resumes for our key higher education team members.



## Clint Davies, MBA, COBIT, ITIL (F), Prosci® CCP Principal

Clint Davies is a Principal at BerryDunn and leads our Management and IT Consulting Group and Higher Education Consulting Practice. He has more than 30 years of experience assisting clients with IT assessments, technology and strategic business planning, process improvement, organizational structure and staffing, IT governance, data governance, service delivery, information security, and planning for future infrastructure, technology, and resource needs. Clint is experienced communicating findings and recommendations to a broad range of technical and non-technical stakeholder groups.

Prior to joining BerryDunn, Clint worked for KPMG in the public and private sectors and for an IT vendor serving K–12 education and public sector clients.

### Relevant Experience

Clint's project work includes:

**Organizational, operational, and staffing assessments.** Clint regularly works with executives and leadership to evaluate and strengthen IT organizational structure, operations, and staffing, and develop funding models to support the most efficient and effective delivery of services. He has guided numerous clients through the process of establishing a vision and goals, evaluating strengths and challenges with the current environment, and recommending changes to align resources to meet the organization's needs. Clint has led all of our higher education IT assessments.

**Strategic technology planning.** Clint has extensive experience working with clients to evaluate their IT environment and facilitate planning for future initiatives, technology, infrastructure, and resource needs. These engagements involve collaborating with client stakeholders to establish a strategic vision for IT that aligns with the organization's overall mission and strategy; developing strategic initiatives; establishing governance and funding models that sustain technology; and crafting roadmaps to guide the implementation of recommendations. Clint has led all of our higher education IT strategic planning projects.

**Business process improvement.** Clint has helped many clients undertake process improvement-related projects. Clients have included colleges and universities, public sector organizations, healthcare organizations, and not-for-profits. Projects have entailed streamlining operations, processes, and workflow; developing management skills; teaching new practices and procedures; and adopting new technology. He also helps organizations find opportunities to achieve cost reduction and greater efficiency and effectiveness of services through the use of technology. Clients have included Texas A&M University, California Western School of Law, Excelsior College, Montgomery College, Averett University, Community Partners, and Southern Adventist University, among others.

**Evaluating enterprise system needs and conducting system selection.** Clint has conducted more than 100 requirements definition and software evaluation and selection projects. He has assisted clients with evaluating enterprise, operational, financial, HR, and administrative system needs, including ERP/SIS. As part of this work, he has researched best practices at peer institutions, evaluated viable commercial systems and alternate solutions, and developed recommendations based on the organization's business priorities, technology environment, and operational needs. Clint has also led the development of RFPs/RFIs, facilitated the vendor selection process, and represented clients in negotiations with system vendors. He

has also provided independent oversight of multi-year system implementations. Clint's higher education enterprise system experience includes work for Aims Community College, the Tennessee Board of Regents, Texas A&M University, Western Illinois University, Wayne State University, Washington State University, and Excelsior College, among others.

**IT risk, control, and compliance work.** Clint is experienced in conducting IT risk and technology compliance assessments and making recommendations to improve security, maturity, and operational performance. Clint has experience working with NIST, ISO, HIPAA, and other compliance standards, as well as looking at IT controls. He has also served as the Project Principal for penetration testing, SOC, and PCI compliance engagements for clients in higher education and other industries. Clint has led information security and risk assessments and audits for Western Nebraska Community College, Columbia College of Chicago, the Colorado School of Mines, the University of Minnesota, the University of Tennessee System, the University of North Carolina at Charlotte, and the Community College System of New Hampshire, among others.

**Change planning.** Clint is a Prosci® Certified Change Practitioner. He is adept and experienced in change management practices and the communications that support and set the tone and direction for change. His work has entailed helping management establish a guiding vision, planning for change, communicating to the community and stakeholders who need to change, and planning, creating, and executing follow through strategies and tactics to gain buy-in and support.

**Advising leadership.** Clint has considerable experience working with executives. He is an effective communicator, teacher, coach, and advisor to leaders who have institutional and technology responsibility. He brings this to all his clients.

## **Education and Memberships**

MBA, University of Maine at Orono

Certified in COBIT 5 Foundation

ITIL Foundation Certificate in IT Service Management

Prosci® Certified Change Management Practitioner

Clint regularly participates in higher education association conferences, such as NACUBO and EDUCAUSE, and speaks at industry events. He writes articles on management and technology topics and served as a speaker at the NACUBO and ACUTA conferences on the topic of IT Planning.



**David M. Houle, MS, COBIT, CPP, ITIL (F), Prosci®  
CCP  
Senior Manager**

David Houle is a Senior Manager in BerryDunn's Higher Education Management and IT Consulting Practice. He has more than 20 years of experience conducting IT assessments and strategic planning, process improvement, IT security risk assessments, infrastructure planning, and enterprise system evaluation, selection, and implementation.

**Experience Highlights**

David's project work includes:

**Building greater value in higher education organizations, processes, systems.** David is an active consultant on projects and regularly works with clients to identify opportunities to strengthen people, processes, and systems, and better align technology with the overall strategic direction of the institution. His experience includes working with clients to evaluate and recommend improvements to organizational structure, business processes, staffing, operations, and IT security to improve the efficiency, effectiveness, and delivery of quality services to customers. He has led IT assessment projects for Suffolk County Community College and Warner Pacific University, among others.

**Strategic technology planning for higher education.** David leads IT strategic planning projects, which has involved working in collaboration with college/university leadership and stakeholders to establish a strategic vision for IT; conduct gap analyses; and develop strategic initiatives. These projects also typically include evaluating organizational needs to achieve the strategic vision, developing an IT governance model, determining funding strategies, and developing a roadmap to guide the implementation of recommendations set forth in the IT Strategic Plan.

**Needs assessment and vendor selection.** David works with colleges, universities, and state education systems to evaluate enterprise systems, including recommending the replacement of systems, as appropriate. This includes conducting needs assessments, conducting feasibility studies of commercial vendors, developing requirements, developing the RFP, facilitating the vendor selection process, assisting with contract negotiations, and providing implementation oversight. Recent clients include Excelsior College, Calbright College, and Minnesota State.

**Managing IT risk in higher education.** David is experienced managing information risk projects for higher education clients. His work includes managing an Information Security Assessment for the University of Minnesota and an Organizational Security Posture Assessment for the University of Tennessee System. David was the Project Manager for an IT Assessment for the University of Arkansas System and an IT Assessment and Master Plan for the University of Nevada at Las Vegas, both of which included a security component. He also conducted a PCI compliance assessment to evaluate processes and systems related to eCommerce for Washington & Lee University, and compliance consulting and IT security assessment work for Johnson & Wales University.

*“David Houle's eloquence and understanding of Higher Ed made the engagement, services provided, and final assessment a very satisfactory experience.”*

*– BerryDunn's customer satisfaction survey*

**Data management needs assessment and establishing governance.** David regularly works with colleges, universities, and government agencies to assess data management practices and recommend improvements to and/or create frameworks for data governance. Some of his most recent projects for data governance and management included Excelsior College, California Western School of Law, and Colby College.

David is a Certified Process Professional, a designation of the International Process and Performance Institute.

### **Education and Memberships**

MS, Management of Information Technology, University of Virginia, McIntire School

Certified Process Professional (CPP)

Certified in COBIT 5 Foundation

ITIL Foundation Certificate in IT Service Management

Prosci® Certified Change Practitioner

David regularly speaks and participates in higher education association conferences, such as NACUBO, EACUBO, and EDUCAUSE, and other industry events.



## Joe Traino, MBA, Prosci® CCP Senior Manager

Joe Traino is a Senior Manager in BerryDunn's Higher Education Management and IT Consulting Practice. He has more than 28 years of experience in delivering technology and strategic solutions to meet critical client needs in higher education.

### Relevant Experience

Joe's experience includes:

**IT assessments and IT strategic planning.** Joe has led many IT assessments and strategic planning projects for colleges and universities. Through these engagements, Joe has been able to provide clients with a better understanding of their environments through a fact-finding and holistic approach and provide recommendations to improve their operations. He provides higher education clients with effective and efficient approaches, and has provided realistic roadmaps to guide clients to meet the strategic goals of their institution. Joe's work includes projects for the Colorado School of Mines, Western Nebraska Community College, Prescott College, Santa Monica College, and the Los Angeles and Long Beach campuses of California State University.

Prior to joining BerryDunn, Joe was employed by CampusWorks, where he led second-opinion assessment teams in providing comprehensive IT and security reviews for more than 25 clients across North America. He also created new technical services offerings, including chief information security officer (CISO) as a service, remote database administrator services, and enterprise resource planning (ERP) programming services.

**IT risk, control, and compliance work.** Joe is experienced in conducting information risk, security, and compliance assessments and making recommendations to improve security and operational performance. He works with institutions to assess and mitigate the impact of vulnerabilities found. He provides higher education executives with the broader picture of IT risk management to help them achieve strategic goals.

As a former director of technical services at the University of Baltimore, Joe identified network vulnerabilities; secured funding for equipment purchases; and implemented redundant firewalls, core routers, and switches to eliminate single points of failure throughout campus, providing 99.99% network availability yearly. Joe chaired the Disaster Recovery committee to develop and test the IT emergency plan for the University. He also initiated a Disaster Recovery reciprocity agreement with the University of Maryland, Eastern Shore, to provide off-site facilities.

**ERP/SIS evaluation, assessment, and implementation.** Joe leads ERP/SIS assessments, business process reviews, and implementation initiatives for colleges and universities. He has provided thoughtful, trusted advice and guidance to clients seeking greater efficiencies from their ERP/SIS systems, and in some cases, recommended strategies for ERP/SIS replacement based on the client's desired outcomes. He has led several ERP/SIS implementations and upgrades, including moving to the cloud. Joe has hands-on experience with the challenges with these large initiatives and brings expertise in applying successful solutions. Joe has led several ERP/SIS evaluations to determine the overall effectiveness of the ERP/SIS system and the ability of the institution to leverage all features and functionality to meet the academic and business needs. As a previous CIO in higher education, Joe has the insight, experience,

and understanding of how important a well-implemented and well-aligned ERP/SIS is to the mission of a higher education institution.

**Higher education IT leadership.** Joe has provided senior leadership and project management expertise to higher education institutions. Joe served as the Chief Information Officer (CIO) for Norfolk State University, and for five years Joe served as Chief Technology Officer (CTO) for Coconino Community College in Flagstaff, Arizona. While serving as the CTO at Coconino, Joe:

- Led the selection process for the a new Learning Management Systems (LMS)
- Set the strategic direction for the College's IT services
- Developed an IT governance structure to engage constituent leaders across the College
- Implemented a student print management strategy, saving 70% in printing costs per month
- Led the migration to Banner 8.x environment
- Led a staff of 26 and managed a \$4 million budget

For two years, Joe served as the Deputy Chief Information Officer (CIO) at the Community College of Baltimore County, the largest community college in Maryland. While serving as the Deputy CIO, Joe:

- Provided CIO leadership to the IT organization
- Led the administrative and infrastructure divisions of IT organization with over 55 staff
- Managed a successful \$2M telephone upgrade project across three campus locations, including RFP development
- Oversaw network and telephony design, purchases, and installation during a new library building construction

With his direct, hands-on higher education leadership background, Joe brings a unique perspective and experience to clients as they transform their IT organizations and technology.

### **Education and Memberships**

EdD (anticipated 2021) Organizational Leadership, Grand Canyon University

MBA, Northcentral University

BS, Computer Science, University of Baltimore

Prosci® Certified Change Practitioner



**Tina Bode, BS, CISA, COBIT, CRISC, ITIL (F),  
LSSGB, Prosci® CCP  
Manager**

Tina Bode is a Manager in BerryDunn's Management and IT Consulting Group. She provides consulting and advisory services to clients in multiple industries, including higher education, financial services, and healthcare, with a focus on security, risk, and internal controls. Tina has over 11 years of experience assisting clients with process improvement, internal controls assessment, organizational assessment, risk, audit and compliance needs.

### Relevant Experience

Tina assists clients with a variety of issues, including:

- Examinations of risk and internal controls
- Business and financial processes and workflow evaluation and improvement
- Operational assessments
- Policy and procedure review and development
- Compliance assessments
- Organizational assessments, including redesign
- Information assurance services
- Information technology audits
- Security program assessments
- Information technology assessment and planning
- Software and system selection

A few of these services are explained in greater detail below.

**Risk assessments.** Tina is Certified in Risk and Information Systems Control (CRISC) and leads projects to systematically identify and evaluate risks in information technology. Her experience includes working with clients to evaluate and document their risks, and assist them in prioritizing and implementing strategies and action plans to manage and mitigate the risks identified.

Tina was recently involved in a project to assess information security controls at an organization and catalog areas of risk. Over 100 risks were identified in this effort and she provided recommendations for implementing controls to mitigate those risks.

**Internal controls.** Tina has conducted more than 150 risk- and controls-related engagements, including internal audits, financial audits, controls reviews, operational reviews, risk assessments, System and Organization Controls (SOC) examinations, and Sarbanes-Oxley (SOX) 404 audits. As part of these engagements, Tina identifies, documents, and assesses internal controls, risk, and IT policies and practices. Tina develops recommendations for strengthening control environments and risk management programs.

Tina has recently provided services to Georgia State University's Georgia Policy Labs, the University of Minnesota, the University of Minnesota Foundation, and West Virginia University.

**Business process and workflow evaluation and re-engineering.** Tina conducts business process and workflow assessments. She has evaluated, documented, and designed clients' business and finance department processes and operations, including month end close, accounts payable, billing, payroll, and HR. These process improvement engagements have identified "as is" and "to be" business processes, which has led clients to make changes in processes, roles and responsibilities, and enterprise software applications used.

**Organizational design.** Tina is experienced assessing organizational structure—and where necessary, identifying appropriate restructuring options. Her work has included assessing and aligning job tasks and descriptions, processes and workflow, and policies and procedures. Tina was the Project Manager for an organizational structure assessment project BerryDunn conducted for a client. The client was seeking to redesign two of its departments (Treasury and Accounting) to make sure they had the right people in the right places to provide the best reporting information to management and CFOs. As part of this effort, Tina evaluated job roles (tasks and descriptions), processes, workflow, and policies and procedures. Based on the project findings, Tina developed future state plans and identified educational needs and retraining of staff. As the Project Manager, Tina's work on this engagement included project planning, on-site interviews and collaborative work sessions with key stakeholders to understand the organization's people, processes, and technology, including their needs, flow of information, use of technology, system capabilities, and desired efficiencies.

**IT assessments and strategic technology planning.** Tina conducts thorough evaluations of IT services, processes, organization, operations, systems, and infrastructure. This work has entailed all facets of assessment and planning, including project management and scheduling, technical evaluation, gap analyses, budget review, gaining stakeholder perspectives, and interviews and focus groups. She also leads the development and prioritization of strategic initiatives and helps clients plan for the implementation of recommendations.

**System selection, planning and implementation.** Tina guides clients through the process of planning for, selecting, and implementing new software. A central part of these projects involves IT staff, administrators, finance, and other stakeholders to build understanding for the organization's needs, gain buy-in and support for the future system, and begin the process of planning for change.

**Financial auditing.** Prior to joining our Consulting Group, Tina worked in BerryDunn's financial auditing group completing financial statement audits and reviews for clients in the higher education, not-for-profit, and manufacturing industries.

### **Education and Memberships**

BS, Business Management with a concentration in Economics and Strategic Management, Babson College

Certified Information Systems Auditor (CISA)

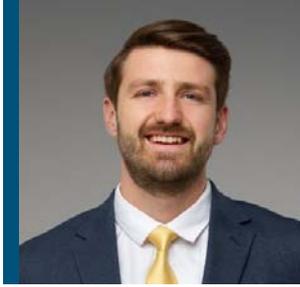
Certified in Risk and Information Systems Control (CRISC)

Lean Six Sigma Green Belt (LSSGB)

Prosci® Certified Change Practitioner

Certified in COBIT 5 Foundation

ITIL Foundation Certificate in IT Service Management



**Tucker Cutter, BS, PMP, COBIT, ITIL (F), LSSGB,  
Prosci® CCP  
Manager**

Tucker Cutter is a Manager in BerryDunn's Higher Education Management and IT Consulting Practice. He conducts IT assessments, organizational and process improvement, enterprise system planning and selection, and strategic technology planning.

### Relevant Experience

Tucker's project work includes the following:

**Business process analysis and IT service design and management.** Tucker works with clients to align their IT services and processes with institutional objectives. This work includes facilitating work sessions to map current and future state processes; identifying best practices; benchmarking against peer institutions; and developing detailed roadmaps to improve IT service management.

His recent experience includes an engagement with the University of North Carolina at Charlotte's Division of Business Affairs where he analyzed IT services, organization, and service delivery. He developed educational materials regarding IT service delivery concepts and principles, and facilitated workshops on IT service design. He worked with EDUCAUSE Center for Analysis and Research (ECAR) service design constructs and elements, and participated in the development of the IT service catalog.

Tucker also led an effort to align the incident management processes of the seven universities that comprise the University of Maine System. This effort included mapping current state processes and developing future state processes to align on a unified ticketing system.

Tucker's experience also includes business process improvement engagements with California Western School of Law and Excelsior College.

**Project health assessments.** Tucker recently served as the project management and governance lead for a project health assessment that BerryDunn conducted for a large technology modernization initiative. Tucker's role on the project included project planning, documentation review, designing and developing stakeholder surveys, facilitating interviews and focus groups, identifying project risks and issues, and recommending remediation strategies. Assessment areas that Tucker was responsible for included: project planning, scope management, schedule management, budget, funding, communication, organizational change management, change control, training, compliance, project governance, risk and issue management, stakeholder management, and resourcing.

**Enterprise systems consulting.** Tucker provides ERP and other system consulting services to our higher education clients. He participates in all aspects of the project, including cost-benefit analyses, Net Present Value calculations, and conducting in-depth research on enterprise system vendors ranging from COTS products to SaaS to community source. Some of Tucker's work includes conducting ERP/enterprise system feasibility studies for Excelsior College, the Tennessee Board of Regents, Western Illinois University, Wayne State University, and Washington State University.

**IT organizational reviews.** Tucker works with clients to identify opportunities to gain efficiencies and cost savings through better use of resources. This includes facilitating organizational change and redesigning IT services. He was a core team member in our organizational reviews for the Tennessee Board of Regents, the Community College System of New Hampshire, California State University – Long Beach, and Suffolk County Community College.

His recent experience also includes a University-wide IT Organizational Review for the University of North Carolina at Charlotte. Tucker assessed all IT resources and services at the University to recommend a future organizational structure and roadmap designed to improve efficiency, best meet IT needs, and provide professional development opportunities for IT staff.

**IT assessments.** Tucker works with clients to conduct comprehensive assessments of IT organizations, including people, processes, and systems. Tucker’s work on these projects includes collecting and analyzing institutional data; interviewing stakeholders; conducting research on key assessment-specific topics, technology and systems, and industry trends; peer benchmarking; documenting and organizing findings; developing the analysis and recommendations; and report writing.

Tucker’s recent project work includes IT assessments for the University of Arkansas System, Granite State College, the Franciscan University of Steubenville, and Westfield State University, among others.

**IT strategic planning.** Tucker provides IT strategic planning services to colleges and universities across the country. He recently conducted IT strategic planning projects for Western Nebraska Community College and Santa Monica College. He has also completed an IT Strategic Planning project for California State University - Los Angeles, and he was a core team member in our IT Assessment and Strategic Planning work for the University of Rhode Island.

### **Education and Memberships**

BS, Business Administration, Dual Option in Marketing and Finance, University of New Hampshire

Certified in COBIT 5 Foundation

Project Management Professional (PMP)

ITIL Foundation Certificate in IT Service Management

Lean Six Sigma Green Belt (LSSGB)

Prosci® Certified Change Practitioner



## Nicholas Favreau, BS, LSSWB, Prosci® CCP Senior Consultant

Nick Favreau is a Senior Consultant in BerryDunn's Higher Education Management and IT Consulting Practice. He provides a variety of technology consulting services to clients including change management, business process analysis and improvement, controls audits, system selections, and the implementation of information systems.

Nick is a Lean Six Sigma White Belt and is a member of the Association of Business Process Management Professionals (ABPMP). Nick has worked at BerryDunn for more than four years.

### Relevant Experience

Nick's project work includes the following:

**Software needs assessments and system selection.** Nick works with clients to evaluate their enterprise systems, including recommending the replacement of systems, as appropriate. This includes conducting organizational change readiness assessment, system needs assessments, mapping business processes, conducting feasibility studies of commercial vendors, developing technical and functional requirements, developing the RFP, facilitating the vendor selection process, and providing implementation oversight.

Nick's most recent project includes a system implementation support engagement for Calbright College in California. The focus of this project was to assist Calbright in the implementation of a new ERP system that includes Student, Finance, HR and Payroll modules. Nick's work on this project included Finance, HR and Payroll process review with Calbright stakeholders, documenting current and future state environments for Finance, HR and Payroll, and CRM, facilitating working sessions between Calbright and the selected vendor, advocating for Calbright needs and wants in sessions with the vendor.

Other projects include:

- A change readiness and ERP/HRIS vendor marketplace analysis for the Colorado School of Mines. The focus of the project was to assist school leadership in understanding where the organization was in relation to their ERP change journey, provide research on the ERP/HRIS vendor marketplace, and identify vendors that appear to meet the needs of the Colorado School of Mines. Nick's work on this project included conducting interviews with stakeholders from around the school to understand the current state environment and what the expectations of stakeholders for a new system would be. Nick also conducted vendor research, developed recommendations for next steps, and report writing.
- An organizational change readiness assessment and facilitating ERP/HRIS vendor demonstrations for Aims Community College. The focus of the project was to help the College leadership understand if staff were ready to change ERP/HR systems after more than 30 years on the existing system and help facilitate vendor product demonstrations that all stakeholders could participate in and provide feedback on. Nick's work on this project included developing change readiness surveys, conducting vendor demonstration scoring surveys, conducting stakeholder interviews, analyzing data, developing recommendations, and report writing.

Prior to joining BerryDunn, Nick was a Financial Analyst at General Dynamics Bath Iron Works (BIW) in Bath, Maine. During his time at BIW, Nick supported several initiatives that analyzed multi-department process flows. He also worked to support the development of a business case for an ERP Warehouse

Management solution. The financial analysis for change included the following components: current functional and personnel costs, additional staff for implementation and maintenance in IT, projected implementation costs, potential benefits gained, and a return on investment estimation.

In a previous position at CSC in Portland, Maine, Nick provided project management for system-related efforts, including:

- Building and managing the change management of projects with his client counterparts. Nick worked with his client counterparts to plan any organizational changes that might result from projects and presented these findings to executive leadership to make the determination to execute the change.
- Facilitating cross-functional meetings with the client's staff from all levels of the organization, from receiving clerks to Director-level in order to understand scope and requirements for potential projects.
- Assisting the Consultant Project Manager with a \$2 Million SAP WM Module implementation, which led to an "exceeding" client expectations rating and an additional \$500K in project work to perform an Agile enhancement phase.

**Business process management consulting.** Nick is experienced with process mapping, analysis, and plan execution. Nick was the lead consultant for our work with Texas A&M University's Office of Graduate and Professional Studies (OGAPS). His work for Texas A&M included:

- Developing a report on automating their Graduate Student Degree Planning system. This report discussed the improvements to business processes, impact to staffing, impact to service delivery to their stakeholders, and identified over 500 manual processes for elimination.
- Completing an options analysis for a new Graduate Students Degree Planning system. This options analysis analyzed multiple options for how OGAPS should proceed with implementation.
- Developing a business use case for process automation at the University. The financial analysis for change included current functional and personnel costs, project implementation costs, and benefits gained.

One of Nick's recent projects involved working with Colby College to identify pain points and facilitate the mapping of As-Is payroll processes with the College's Payroll department and other key stakeholders. Nick managed the documentation of 26 payroll processes across information systems to assist with onboarding of new staff and in anticipation of a transition to a new ERP system. Nick provided guidance to enable Colby to maintain the process maps after the conclusion of the project.

### **Education and Memberships**

BS, Business Administration, Drexel University

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Lean Six Sigma White Belt (LSSWB)

Member, Association of Business Process Management Professionals (ABPMP)



## Joshua Eby, BS, Prosci® CCP, CAPM Consultant

Josh Eby is a Consultant in BerryDunn's Higher Education Management and IT Consulting Practice.

### Relevant Experience

Josh's project work includes the following:

**Organizational reviews and business process improvement.** Josh works with clients to identify opportunities to gain efficiencies and cost savings through better use of resources. This includes facilitating organizational change and redesigning services. He was a core team member in our organizational review for the University of North Carolina at Charlotte. Josh assessed distributed IT resources and services at the University and recommended a future organizational structure and roadmap designed to improve efficiency, best meet IT needs, and provide professional development opportunities for IT staff.

Josh's project work also includes business process consulting for Texas A&M University's Office of Graduate and Professional Studies (OGAPS).

In addition to organizational reviews, Josh assisted with an IT employee market analysis and compensation evaluation for Middle Tennessee State University and an ERP selection and implementation for Excelsior College. He recently completed a self-sustainability assessment for the Pennsylvania State System of Higher Education.

**Strategic planning.** Josh collaborates with clients to identify and establish strategic technology priorities that support the institution's mission. Josh's role on these projects includes facilitating cross-functional work sessions with campus stakeholders; prioritizing initiatives; and establishing implementation timelines. His project experience includes technology strategic planning work for Santa Monica College and Western Nebraska Community College.

**IT assessments.** Josh works with higher education clients to conduct comprehensive IT assessments of people, processes, and systems. Josh's role on these projects includes collecting and analyzing institutional data; interviewing institutional stakeholders; peer benchmarking; documenting and organizing findings; developing recommendations; and report writing. His project work includes work for Westfield State University, Columbia College Chicago, Wesleyan University, and the University of Maine System, among others.

**HIPAA security assessment.** Josh is the lead consultant for a HIPAA Security Rule Risk Assessment that BerryDunn is conducting for over 30 units at the University of Minnesota.

**Other higher education finance experience.** Prior to joining BerryDunn, Josh was a Student Assistant at Babson College Student Financial Services. His responsibilities included auditing loan disbursements to ensure accuracy and assisting parents and students with student accounts and financial aid packages.

During his time at Babson College Student Financial Services, Josh gained experience in higher education administration and frequently used PowerCampus and PowerFAIDS.

### Education and Memberships

BS, Business Administration with concentrations in Operations Management and Historical and Political Studies, Babson College

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Certified Associate in Project Management (CAPM)

### 3.4 Continuity of Consultants

RFP Section XI.1.d. Describe the ability to provide continuity of consultants throughout the duration of a project. Provide examples of both on-site and remote teams that would work with George Mason University.

We understand the importance of continuity of personnel on each engagement and make every attempt possible to assign our experienced professionals to each client on a long-term basis. We feel it lets us truly understand your operations and serve you efficiently and effectively. Continuity also minimizes the time required of your personnel to introduce a new member of the engagement team to your operations. However, in the event we need to draw upon backup personnel, we have developed processes and systems to provide all project team members with the information they need to gain an understanding of the history of the project and quickly get up to speed on the current status of the project.

While the team members individually bring expertise to this project, as a group they will provide Mason with a strong, objective team that establishes credibility, professional trust, and cooperative working relationships with the Mason and your project manager, staff, key stakeholders, and vendor(s).

Our consultants are accustomed to traveling to client sites based on the needs of the project. Consultants spend their time working both on-site at client locations and working from one of BerryDunn's offices or their home office. The right balance of time will be determined in conjunction with Mason on a project-by-project basis.

### 3.5 Our Core Services

RFP Section XI.1.e. Describe services available from your firm and/or partners and associated costs.

Our dedicated Higher Education Management and IT Consulting Practice offers a range of services designed to address your current and future IT environments and needs, including those identified in your RFP:

- ✓ **Business Management Services**, including:
  - Operational assessments
  - Organizational structure, including central and distributed units
  - Management, staffing levels, skill sets, training, and compensation
  - Business process mapping and improvement
  - Benchmarking
  - IT strategic planning, including assistance implementing and updating strategic initiatives
  - Implementation services
  - Change management
  - Performance, efficiency, and effectiveness

- ✓ **Enterprise Applications Services**, including:
  - Business analysis
  - Alignment of infrastructure, technology resources, and enterprise systems with current and future academic, business, and research needs
  - Assessment, planning, selection, procurement, and implementation oversight assistance
  - Cost-benefit analysis
  - Integration of information systems and data
  - Independent Verification and Validation (IV&V) and Quality Assurance (QA)
- ✓ **Project, Program, and Portfolio Management Services**, including:
  - Resource capacity planning
  - Resource sourcing and management
  - Time management
  - Demand management
  - Reporting services
  - Integration
- ✓ **Strategic IT Services**, including:
  - IT governance
  - Data governance
  - Information security
  - Program strategy assessments
  - Risk assessments
  - Compliance evaluations [e.g. Family Educational Rights and Privacy Act (FERPA), Payment Card Industry (PCI), the Gramm-Leach-Bliley Act (GLBA), the Health Insurance Portability and Accountability Act (HIPAA)]
  - Vulnerability scanning, social engineering, and penetration testing
  - Business continuity and disaster recovery planning
  - IT service design, service delivery, and customer satisfaction—including the assessment and development of shared services

Please refer to Section 7 of this proposal for our pricing for these services.

### 3.6 Our Ability to Assist with Training and Documentation

RFP Section XI.1.f. Describe the ability to assist in the development and offering of training and documentation.

Our team does not give the same training twice. While we have a core set of training curricula, and a consistent training development and implementation methodology, we do not believe “canned” approaches work to educate individuals and effect change in an organization. For

each of our engagements, we build in time to customize course content and, in collaboration with our clients, create a training experience that best meets the specific goals and objectives of each client.

We identify the organizational objectives and assess the educational needs and requirements before spending any time customizing our existing curriculum and preparing materials. For example, we meet with client leaders to understand organizational goals and related training objectives, test to make sure those two are aligned and identify organizational culture/historic attitudes, issues, and concerns that may have an impact on whether the training is successful.

We review any data or documents that will help us understand the organization and its mission, review existing training materials or courses that have been used, and then meet with a representative group of “learners” to understand what their needs for training are, identify what they think it needs to be successful, challenges, etc. Finally, we review our findings with the leadership team to fine-tune the overall project objectives and approach. This task is the foundational step in making sure we successfully customize our existing curriculum to meet the client’s unique needs.

The methodology we use to develop training materials is outlined in Exhibit B and is based on the American Society for Training Standards Instructional System Design (ISD) model.

#### Exhibit B: Training Methodology



We typically apply a **Train-the-Trainer Approach**. We have found that it is not effective to simply designate a group of people to "train the masses." Effective train-the-trainer initiatives require selection of the right people to carry out the work. We use the following best practices in helping our clients design an effective train-the-trainer effort:

- **Identifying the right combination of subject matter expertise and ability to train and coach others.** Critical skills for trainers include the ability to establish rapport with an audience, ability to think on their feet, expertise in the field and a thorough understanding of the material, and ability to draw from an assortment of examples and analogies and express the content in terms the participants can relate to.
- **Having employees "apply" to this role, just as you would any other job in your organization.** They should be required to demonstrate their skills through a mock

training that they deliver to a selection team made up of our consultants and your internal training department.

- **Providing useful supporting materials.** We create detailed lesson plans for your trainers to use and ask them to help us modify them as we train them in the use of the course materials and content.
- **Creating feedback loops.** Trainers need support on an ongoing basis and clear channels of communication to allow them to seek information and provide input to continually improve the training process, content, and delivery. Those who developed the curriculum and staff participating in the training should make themselves available to receive input and convey an open, transparent and non-defensive posture as they interact with trainers.
- **Measuring, monitoring, and working together for continuous improvement.** We help the trainers consistently implement the evaluation approach we design as part of the engagement. This is particularly important when a group of trainers is training employees in various locations or settings.

BerryDunn has an internal Learning & Development practice that we can also leverage for best practices in training and development.

### 3.7 Examples of Recent Projects

RFP Section XI.1.g. Provide examples of recent projects at representative agencies comparable to George Mason University. Describe the project, time frame, end result, etc. Prior higher education experience is preferred but not required.

In this section, we have provided several examples of recent projects that are comparable to Mason.

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We would be happy to provide additional project examples upon request.

### 3.8 Knowledge Transfer is a Priority in Our Work

RFP Section XI.1.h. Describe the ability to provide for a thorough transfer of knowledge to Mason IT on any given project.

We make knowledge transfer a priority in our work. Our activities are designed to help ensure a smooth transition of our work to Mason.

We emphasize collaboration in our project work, helping to ensure key stakeholders remain engaged throughout the project lifecycle. This collaborative approach, combined with the creation of deliverables and the use of tools that can be employed to sustain progress—where appropriate, help ensure knowledge is effectively transferred between BerryDunn and Mason.

## 3.9 Functional Staffing Plan

RFP Section XI.1.i. Describe how your firm would propose a functional staffing plan indicating the number, characteristics, and schedule for the consultants.

With BerryDunn, Mason will have access to a large group of management and IT consulting professionals possessing a wide range of skills and experience.

When Mason sends a project request, we will consider the nature of the work to be conducted, the level of commitment requested (e.g., full-time, part-time, on-site, off-site), and the duration of the project in our determination of staff assignments.

We will then propose an individual or a team based on level of fit to your needs and availability to conduct the work for the full duration of the project. Our typical project team consists of a project principal, project manager, and a team of senior and junior level consultants and technical specialists based on the needs of the project.

Our consultants typically work Monday – Friday from 8:00 a.m. to 5:00 p.m. ET. However, because we work with clients nationally (including in Alaska, Hawaii, and U.S. territories), we are accustomed and committed to being responsive to our clients' needs. During project planning, we work with you to discuss communication methods and identify strategies to promote effective communication.

## 3.10 Subcontractors

RFP Section XI.1.j. Describe any functions to be subcontracted and the expertise and credentials required from the subcontractor.

At this time, we do not anticipate utilizing subcontractors.

BerryDunn has the skilled internal resources to address Mason's needs in a professional and timely manner. BerryDunn will lead any projects resulting from this contract and be responsible for the completion of tasks and deliverables. All members of our team are directly employed by BerryDunn, maximizing our control over the quality and timeliness of services provided to Mason.

We do occasionally utilize subcontractors to provide subject matter expertise and customize our project support to clients. This includes using local, small, minority-owned, and women-owned businesses. If Mason selects us for a project and we find that it would be beneficial to include a subcontractor, we will consider using a SWaM vendor(s).

Prior to engaging subcontractors, we verify their qualifications and quality of work through various means, including (but not limited to) conducting reference checks, reviewing work samples, and conducting interviews.

We are accustomed to managing teams of BerryDunn employees and subcontractors and have established processes for onboarding and integrating subcontractors into our project team to present a seamless team structure to the client.

## 4. Our Experience and Qualifications

RFP Section XIII.B.4: A written narrative describing the offeror's experience and qualifications in providing IT related support services and consulting services as outlined in section XI, Statement of Needs. In addition, offeror shall include brief biographical and experience information on the management team and any staff that will be responsible for servicing this contract (include an organizational chart).

**Colleges, universities, and multi-institution collaborations have trusted BerryDunn to assess, transform, and increase the value of their IT organizations.**

BerryDunn has a dedicated **Higher Education Management and IT Consulting Practice**. Our experience includes providing IT and management consulting services to more than 140 public and private institutes of higher education, including:

- Two- and four-year colleges and universities (of all sizes and complexity)
- Research universities (R1, R2, and R3 according to the Carnegie Classification of Institutions of Higher Education)—**similar to Mason (R1)**, including Texas A&M University, the University of Minnesota, the University of Nevada – Las Vegas, the University of New Hampshire, Washington State University, and West Virginia University
- Multi-institution systems and consortia
- Law and medical schools
- Religiously-affiliated schools

We understand operations in higher education, as well as the systems and business processes required to provide necessary services to your internal departments and the students you serve. We are knowledgeable of the regulatory requirements with which you must comply, as well as your dedication to providing timely, accessible, reliable, and secure services to your students, staff, faculty, and alumni. The effective use of technology is an important factor for the success of Mason's initiatives and its goals for students, faculty, researchers, and administrators.

We have first-hand knowledge of the resources required to complete large and complex engagements in a thoughtful and timely manner. Table 8 below provides a sample of higher education and other clients for whom we have provided relevant project management, system implementation, business process, change management, and other services. This includes schools of similar size and complexity of Mason. We pride ourselves on completing our work on-time and on-budget.

We have provided consulting services to large and complex research universities like Mason. Table 8 highlights some of our experience with R1 (Very High Research Activity), R2 (High Research Activity), and R3 (Moderate Research Activity) research universities, as classified by the Carnegie Classification of Institutions of Higher Education.

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Our commitment to integrity and serving the needs of our clients has led to sustained growth throughout our 47-year history, as evidenced by our strong financial condition, continued growth in revenue and personnel, and increased geographic diversification.

**Our approach is simple: produce high-quality services for every client, strive for unparalleled customer satisfaction, and deliver both at a reasonable cost.**

You can be confident selecting BerryDunn for this contract—we have the expertise, proven methodologies, credibility, and resources to successfully fulfill your future IT project needs.



For information about our core project team, please refer to Section 3.3 of this proposal.

## 5. Implementation and Transition of Services

RFP Section XIII.B.5: Provide a specific plan for implementation and transition of services from date of award forward.

When a request for proposals (RFP) or statement of work (SOW) is issued by Mason, we will carefully review the document and any addenda in their entirety to confirm our ability to meet the project's needs. If appropriate, we will speak with the designated Mason representative to clarify requirements. We will then develop a proposed approach, strategy, budget, and staffing plan that meet the needs and timeline of the project. Our projects typically involve a combination of on-site and off-site work and include short-term or multi-year engagements.

In order to best align our project approach with Mason's needs, we will develop a custom approach that is carefully tailored to the needs set forth in Mason's RFP/SOW. We will consider the nature of the work to be conducted, the level of commitment requested (e.g., full-time, part-time, on-site, off-site), the number of professionals needed, and the timing and duration of the project in our determination of staff assignments. We will then work to propose an individual or a team based on our level of fit to your needs and availability to conduct the work for the full duration of the project.

The specific project management-related deliverables will be developed in accordance with the scope of work, needs, and expectations for the engagement.

Upon notification of project award, we will facilitate a meeting with Mason to review the proposed work plan and timeline, clarify goals and objectives, and discuss any requested modifications prior to finalizing a contract.

Once we have a signed contract, our project manager manages the project according to the agreed-upon work plan, schedule, and budget. We have an excellent track record of meeting deadlines and, as a standard practice, we only allow changes to the timeline, scope, or project fees based on changes that are documented and approved by the client. BerryDunn will regularly provide status updates against the agreed-upon plan.

Prior to the commencement of any project engagement, our team will work closely with Mason to properly plan and prepare for our assessment, including hosting an initial introductory call to introduce our team, learn about Mason's team, and discuss the project.

As a result of our extensive experience providing IT consulting services to academic institutions, we are skilled at developing realistic timelines that take the client's specific needs and common scheduling challenges into account.

We make knowledge transfer a priority in our work. Our activities are designed to help ensure a smooth transition of our work to Mason.

## 6. Sample Quarterly Sales Report

RFP Section XIII.B.6: Sample Reports: offeror shall include the following sample reports in their proposal:

a. Sample quarterly sales report.

BerryDunn has dozens of pre-qualification contracts with academic institutions and state and local governments. We are accustomed to the reporting requirements often associated with these contracts and we have processes in place to fulfill those needs in accordance with Mason's timeframe and requirements.

We will work with Mason to either utilize Mason's preferred sales report template or to collaboratively design a sales report that meets your needs.

# 7. Proposed Financial Offer/Considerations

RFP Section XIII.B.7: Provide proposed financial offer/considerations, including service pricing for IT related support services and consulting.

In this section, we have provided the information requested in Section XII (Cost of Services) of your RFP.

## 7.1 Hourly Rates

RFP Section XII.a: Please provide hourly pricing for any and all rates associated with consulting, planning, install, implementation, development project management, etc.

Table 9 below provides hourly rates by role for BerryDunn to perform services for Mason, excluding expenses. Please note: BerryDunn does not charge for our time spent traveling to and from client sites.

**Table 9: BerryDunn’s Offsite and On-site Hourly Rates by Role**

	Offsite	On-site
BerryDunn Job Level	Hourly Rate	Hourly Rate
Paraprofessional	\$70	\$90
Consultant	\$150	\$180
Senior Consultant	\$200	\$230
Manager/Project Manager	\$235	\$265
Senior Manager/Project Leader	\$270	\$300
Principal	\$355	\$385

Our composite hourly rates typically run between \$175 - \$240 depending on the project’s scope of work, complexity, and staffing.

As requested in your RFP, we confirm that travel expenses will be reimbursed at cost with no markup and may not exceed Commonwealth of Virginia expense guidelines and per diem rates which are available here: <https://fiscal.gmu.edu/travel/learn-about-meals-per-diem-rates/>

## 7.2 Alternative to Hourly Pricing

RFP Section XII.b: If different than hourly pricing, describe training options and associated costs. Include a catalog of training offerings and differentiation between technical staff and end-user training.

Our typical pricing/fee structure with higher education clients is fixed-fee pricing, using the rates in Section 7.1 above. Our fixed fee pricing is determined on a project-by-project basis using a defined scope of work provided by Mason.

## 7.3 Last Ten Projects Billed on an Hourly Basis

RFP Section XII.c: For your last ten most recent projects (Determined by date of final payment by the customer) that exceeded \$50k and were billed on an hourly basis, list the following:

1. The type of consulting
2. The original estimated hours
3. The final hours billed
4. The original project cost estimated
5. The final price(all charges) paid by the customer

As a professional consulting firm, our typical pricing/fee structure with higher education clients is fixed-fee pricing, using the rates in Section 7.1 above. Our fixed fee pricing is determined on a project-by-project basis using a defined scope of work provided by our client.

If Mason would prefer an hourly billing arrangement, we are happy to discuss that with Mason on a project-by-project basis.