

5.0 Relationship Management Services and Vendor Proposed Staffing Response (Schedule 6.3)

Instructions to Vendors: Vendor shall clearly indicate its approach to providing the relationship management services as documented in Schedule 6.3. Vendor may provide additional information as needed. Provide an overview of the solution you propose to address the Commonwealth Requirements stated in Schedule 6.3.

5.1 Personnel and Organization Overview

Instructions to Vendors: Vendor should provide an overview of the Personnel and Organization that will be assigned to the Commonwealth account. This overview should **not be more than two-pages** long. Additional details should be provided in Section 11 of this Vendor Proposal document.

The Commonwealth Partners' Vision for the Commonwealth

With a partnering relationship as the central focus of our solution, the Commonwealth and the Commonwealth Partners will create an organization and culture to meet the business and strategic objectives for continuing service to VITA's end user community. Together, we will realize opportunities for cooperative value creation and business development for mutual benefit. We understand that in an outsourcing initiative, we must not only address the needs of the end user but also be considerate of the employees who may be affected by this process. The Commonwealth Partners will work within Relationship Management roles and responsibilities to achieve success not only in service performance but also in the sensitive personnel-related issues.

Solution Description

The Commonwealth's IT Infrastructure Initiative success will require a cohesive team of experienced, dedicated, and skilled professionals who will work in partnership with VITA to achieve its vision. The Commonwealth Partners approach is to propose an organization aligned with the Commonwealth's Relationship Management objectives that are focused on:

- Delivery of high-quality IT services
- Continued high customer satisfaction
- Minimizing the impact of service disruption on the Commonwealth
- Continuous innovation and use of technology aligned with Commonwealth business benefits and objectives
- End user Customer service processes and procedures
- Cooperative value creation and business development
- Communication and organizational change management

The Commonwealth Partners understand that minimizing risk associated with building the needed IT infrastructure and transitioning services is pivotal to the success of this effort. Our collective approach and plan reduces risk and promotes success. Our organizational governance, and the personnel assigned to this organization will provide VITA with a "worry free" approach to managing the relationship, thus enabling VITA leadership to spend its time focused on business development and developing innovative solutions critical to the ongoing success of its mission.

Our proposed team members, collectively and individually, possess extensive experience in data center managed services, business transformation and organizational change, customer services centers, human resource management, and program management.

All Project Managers assigned as key personnel are certified by the International Project Management Institute (PMI) as Project Management Professionals (PMP).

The Commonwealth Partners are committed to co-managing the relationship between our respective organizations. Each tier of the proposed governance model, Strategic, Operational, Business Development, Communications and Change and Technology, has specific roles and responsibilities, and is supported by key members of the Commonwealth and the Commonwealth Partners.

Benefits/ Future State

By investing in a cooperative relationship and service management organization, VITA and the Commonwealth Partners will deliver on the current and future service needs of the Commonwealth and its customers. Through cooperation and collaboration, we will jointly define a relationship that evolves from rear-view, after-the-fact learning to business forward-looking and predictive approaches to managing incidents, problems, and issues that arise in the environment. We will work with the Commonwealth to determine mutual investments and benefits and, together, define “success”.

Communication on all levels of an organization is an ongoing process. The Commonwealth Partners propose a tiered Relationship Management Model to facilitate communications and management decisions between our management teams. This model is designed to effectively align the Commonwealth’s management structure with ours, and enable unambiguous communications between all involved parties. This governance model also provides consistency in the management approach, processes, delivery of services, and business alignment. Our goal is to join the Commonwealth in creating a cohesive project and service management organization supporting the control and direction of the VTTP Infrastructure Services.

IBM has long recognized the importance of project management when it comes to delivering successful projects to our customers. Over the past several years, IBM has invested in equipping our many experienced project managers with the necessary integrated methods, education, and tools to successfully meet our customers’ business needs across the scale of requirements for an enterprise project management solution.

IBM’s dedicated, qualified, project management professionals, using IBM’s proven methods that are integrated within IBM’s fundamental business processes, provide the Commonwealth with fully scaleable project management capabilities that are second to none with several key project benefits:

- Risk is managed more effectively because the project is properly defined, within the customer’s business environment, with risks clearly identified and managed
- Productivity is increased by a clear definition of roles, responsibilities and deliverables, resulting in faster startup through the use of knowledge management, less rework and more productive time in the project
- Communication is easier and clearer because customer and IBM project teams form more quickly and use common terminology
- Customer visibility to the project plans, schedule and actual performance against the project objectives is enhanced, helping to increase customer satisfaction

5.2 Vendor Account Team Organization and Staffing

Four fundamental tenets underlie IBM’s approach to managing projects:

- **Project management process** – During project initiation tasks and throughout execution of the work plan, the project team focuses on defining and planning to provide a mutual understanding between the Commonwealth Partners and the Commonwealth on the scope of the project and identifying accompanying risk factors to achieve the required business objectives.
- **Project organization and responsibilities** – Members of the project team define and agree on the key project team members and their roles and responsibilities including appropriate sponsorship so that project results are met.
- **Project phases** - Work is phased to provide the opportunity to reassess risks at key points throughout the project.
- **Relationship management system** – A governance system is established that will define and apply the appropriate governing processes for all project activities. This structure defines and facilitates communication among the management teams and establishes structures for efficient decision making at appropriate levels in the organization.

In this section, we provide an overview of the “Project organization and responsibilities” and the “Relationship Management System” Key Executive Team Roles in Section 5.2.2.

The Project Management Process is discussed in Section 2, “Vendor Profiles” of this response. Project Phases are presented in Schedule 3.2 the Transition Plan

5.2.1 Organization Chart

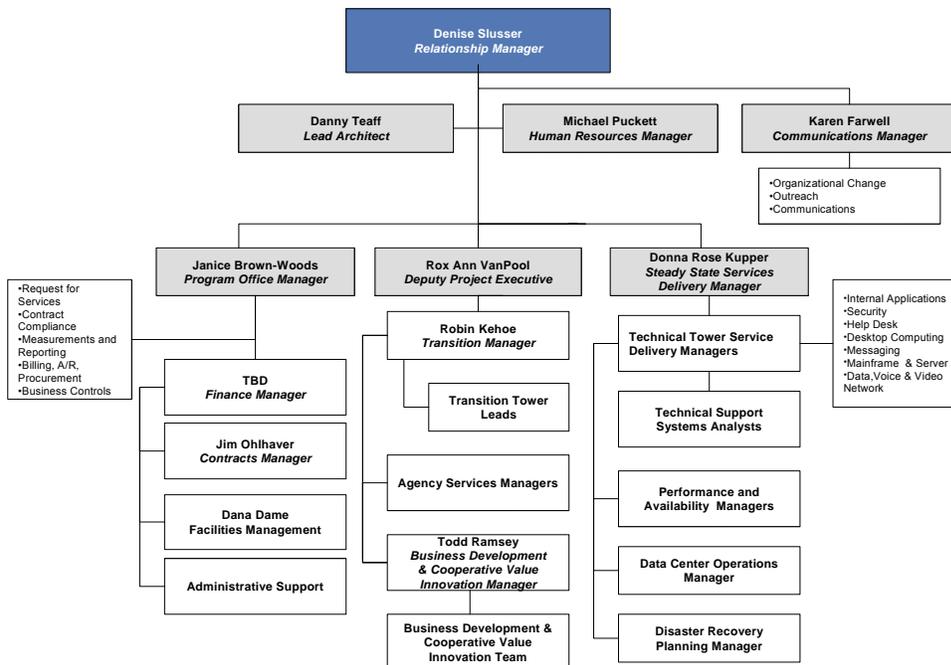


Figure 5 – 1. Organization Chart of the Commonwealth Partners’ relationship team

5.2.2 Key Account Team Management Organization and Roles

Functional Role	Responsibilities
Relationship Manager	The Relationship Manager provides overall management of the relationship between the Commonwealth Partners and the Commonwealth for this Project. Along with management responsibility for the Team and our partners, she will work with the Commonwealth Management Team to formulate joint objectives, plan for execution, periodically adjust the IT Services Portfolio, and be responsible to the Commonwealth and the Commonwealth Partners for the overall customer satisfaction of VITA, Commonwealth stakeholders and operational users.
Financial Manager	The Financial Manager is the liaison between the Commonwealth Partners and VITA and serves as the primary contact for all billing and financial issues.
Contract Manager	The Contract Manger is the liaison between the Commonwealth Partners and VITA. He is responsible for monitoring compliance with the Comprehensive Infrastructure Agreement terms and conditions and makes recommendations to resolve issues related to non-compliance; Create, negotiate and incorporate amendments into the Agreement as necessary; and coordinate the Agreement negotiations/re negotiations to accommodate scope changes or changes to business requirements. The Contract Manager will identify and manage Performance Credits based on performance information and Comprehensive Agreement terms.
Steady State Services Delivery Manager	The Steady State Services Delivery Manager role is the key interface and coordinator for all Services delivered and is primarily responsible for delivery and management of the Cross Functional Services Tower. The Services Manager is experienced in multi-tower service delivery using Enterprise Operations Processes (EOP).
Technical Tower Service Delivery Managers	<p>Technical Tower Service Delivery Managers (TTMs) are responsible for day-to-day delivery and support of technical services in accordance with Service Levels. TTMs are managed by the Steady State Services Delivery Manager (SDMs) and are aligned with the following tower responsibilities:</p> <ul style="list-style-type: none"> • Internal Applications Services • Security Services • Help Desk Services • Desktop Computing Services • Messaging Services • Mainframe and Server Services • Data Network Services

Functional Role	Responsibilities
	<ul style="list-style-type: none"> • Voice and Video Telecom Services <p>The SDMs will be responsible for the achievement and subsequent reporting for committed Service Levels for their respective towers and addressing any operational issues that may arise. The SDM will monitor trouble ticket queues, assign resources, monitor service delivery, and monitor overall daily operational performance. The SDM will escalate any open problems and follow them through to resolution and will oversee corrective actions to completion.</p>
Lead Architect	<p>The Lead Architect provides overall management and validation of the technical solution for this project. He applies his broad understanding of advanced technology to implement the requirements of the project. He focuses specifically on systems architecture, network architecture, infrastructure implementation and environment maintenance and operations. He leads in the evaluation and use of technologies to align with change in the Commonwealth's business environment.</p>
Human Resources Manager	<p>The Human Resources Manager will work with the Communication and Change Management team to design a communications plan with VITA to ensure all stakeholders receive appropriate communications regarding the partnership and how it affects them; Inform the in-scope employees about the Commonwealth Partners Human Resources (HR) policies and practices; Hold information sessions on compensation and benefits programs; Handle HR issues ; Work to minimize any anxieties about employees transitioning to the Commonwealth Partners by using communications and change management experts who will tailor orientation sessions for the employees; and ensure that the transition to the Commonwealth Partner's team will be seamless and employees will feel welcomed to their new employer.</p>
Communications Manager	<p>The Communications Manager has overall responsibility for managing the impact of Organizational Change related to the project. She has overall accountability for delivering key outcomes to minimize people and organizational risks associated with the Infrastructure initiative: business ownership & leadership alignment; user readiness & adoption, and organizational alignment. Execution of effective, strategic communication strategies and plans to build relationships of trust, manage expectations, encourage commitment, and minimize resistance to change are a critical responsibility of this role.</p>

Our proposed organization is based on the analysis of tasks and activities required in the Comprehensive Infrastructure Agreement and the scope and timing of the work we will accomplish. Our committed key personnel all have the requisite skills and experience to execute tasks to successful and satisfactory completion. The regular presence of senior level individuals in key roles demonstrates a consistent commitment to excellence on the project.

Subsequent to the Effective Date the Commonwealth Partners will work with VITA management to establish the reporting and communication processes that will be used to efficiently and effectively manage the delivery of services. The reporting structure and process will be documented in the

Procedures Manual and reviewed periodically for updates. The reporting structure will identify points of contact for day-to-day operations, while the reporting process will describe the method for reporting status.

The Commonwealth Partners are committed to establishing a Relationship Management structure that promotes communication between VITA, the Commonwealth Agencies and our team. In the Organizational Chart that follows, we have identified Key Account Managers having key Relationship Management responsibilities. But, our entire team is committed to growing a strong relationship with the Commonwealth.

The Commonwealth Partners bring our best to this opportunity; our top-tier management offers the benefits of over 180 years of experience, special training, successful performance, and focus to this opportunity. Our program personnel stand ready to begin the journey with VITA and the Commonwealth of Virginia in successful pursuit of your vision and goals.

5.2.3 Key Executive Team Roles

Instructions to Vendors: Key Executives who will be responsible for performance to which the Account Team will report.

Challenging opportunities of this scope require exceptional people that can meet and exceed expectations. Reaching the Commonwealth's vision will require an uncommon level of leadership, skill, and experience; it is people that will ultimately make the difference between success and failure. The regular presence of senior executives participating in strategic decision making demonstrates a commitment to VITA's success.

John Nyland is General Manager of Public Sector for IBM Global Services. John manages IBM's services business with State and Local Government, Education, and Health Care customers. He has 26 years of experience with IBM supporting government clients with solutions, managed operations and systems integration services. John's role on the VITA Infrastructure Initiative Team will be as a participating member on the Strategy Committee.

Todd S. Ramsey, General Manager for IBM's Global Government Industry, is responsible for IBM business with governments around the world. In this role he sets the overall strategy, develops specific government solutions and marketing programs, and directs the deployment of consultants, government specialists and client-relationship teams worldwide. For more than 25 years Todd has helped governments and public-sector customers leverage information technology to help them promote economic development, increase revenues, enhance services and improve the efficiency and effectiveness of operations.

Brian Whitfield is Vice President of IBM Global Services, State and Local Government. In this role Brian is responsible for IBM's support of existing government customers as well as establishing new customer relationships. He has 13 years of experience with IBM in support of government and commercial customers. Brian's role on the VITA Infrastructure Initiative Team will be as the Relationship Executive and as a participating member on the Strategy Committee.

Scott Sleater is the IBM Global Services Director of Financing and Pricing. In this role Scott oversees approximately eighty finance, pricing, and consulting professionals for IT outsourcing, business process outsourcing, IT services and hosting contracts. Scott personally priced and structured the IBM scope for the Commonwealth of Pennsylvania outsourcing contract and provided outsourcing deal structuring support to the prime contractor. Scott has provided guidance and input for the VITA Infrastructure Initiative pricing team.

Denise Slusser is the IBM Program Executive responsible for Relationship Management and successful delivery of the Infrastructure Program. Denise is an IBM and PMI certified Project Manager with over twenty years experience in various executive, management and technical positions within information technology. She has managed multiple complex systems integration and managed services projects for the

public sector. Denise’s role on the VITA Infrastructure Initiative Team will be the Relationship Manager and as a participating member on the Strategy, Operations and Cooperative Value and Innovation Teams.

Tim Stuller, a Client Executive in IBM’s Public Sector Industry, is responsible for the Commonwealth of Virginia account and overall customer satisfaction. With over 22 years at IBM, Tim has extensive experience working directly with clients, leading cross functional teams, leveraging the breadth of IBM’s product and services offerings, and working with IBM partners to help clients meet their goals and objectives. Mr. Stuller has a track record of high customer satisfaction and maintaining long-term client relationships. He lives in Richmond and has worked with IBM’s Virginia-based clients since 1985. Tim’s role will be as a participating member in the Business Development Committee.

Don Parr, a Managing Director in BearingPoint’s Public Sector State and Local Government practice, is responsible for providing executive leadership and vision for the Commonwealth Partners. Don has vast knowledge of VITA’s organization, operations, policies, and procedures. As such, he was chosen to be a member of the Key Executive Team, will provide leadership, vision and oversight for communications, and will also be a part of the overall Program Management Office.

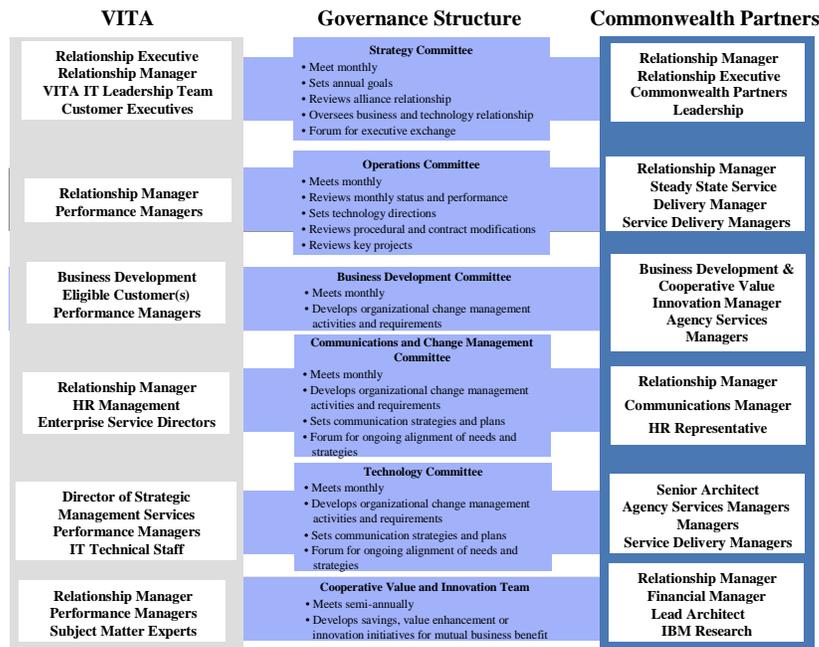


Figure 5 - 2 - The Commonwealth and the Commonwealth Partners will establish a governance structure that transforms our working and personal relationship to create collaborative programs and innovative mutual business enhancement opportunities.

5.2.4 Compensation

Instructions to Vendors: How will Key Account Team and Executives compensation be tied to performance and customer satisfaction?

To ensure the full commitment of IBM's integrated delivery team in meeting VITA's objectives, employees' performance objectives will be linked directly to achievement of service goals that benefit the Commonwealth. In addition, IBM ties the team's compensation to the Commonwealth's satisfaction.

The IBM management and delivery organizations will be motivated to act in the Commonwealth's best interests. To measure their contribution in achieving service goals, IBM employees' peers and management evaluate them annually. IBM links employees' performance objectives directly to achievement of service goals that benefit the Commonwealth.

Key account team members compensation plans are based directly on attainment of customer objectives and overall customer satisfaction. Objectives are documented annually in a work session with the Commonwealth's Relationship Manager and tracked during monthly performance meetings.

The key indicator for satisfaction will be determined by Customer Executive Relationship Surveys, independent third party interviews, conducted annually with the Commonwealth's Relationship Management Team. The survey provides a critical channel for communications between the Commonwealth and IBM and provides direct input to key account personnel performance attainment and compensation. The Commonwealth's Relationship Manager will have the opportunity to provide specific input and rating on a range of service dimensions including Partnership, Responsiveness, Support, Skills, Quality of Service and Value. The Commonwealth will directly influence IBM employees' compensation through this feedback mechanism.

5.3 Biographies

Instructions to Vendors: For key Account Team members, please provide resume and indicate anticipated Account Team role, years of experience in role, last two accounts in role, and references from those accounts.

5.3.1 Program Executive

Denise Slusser – Program Executive	
Account Team role: Relationship Manager	
	<p><i>Denise was selected to serve as Relationship Manager because of her recent experience managing multi-million dollar application development and outsourcing contracts for federal and state and local government agencies, resolving critical situations for customers whose information technology applications and systems are large and complex, and leading the quest for customer satisfaction by initiating new services.</i></p>
Major responsibilities:	
<ul style="list-style-type: none">• Provide overall direction and oversight to the program• Act as the primary liaison between the Commonwealth Partners and VITA• Develop and implement a future vision for the partnership• Work with VITA to resolve contract-related issues throughout the life of the program• Monitor program level status• Approve or disapprove modifications to the overall schedule, scope, or deliverables prior to submitting them to VITA for sign-off• Maintain open lines of communications with project managers through regular meetings and communications• Hold final decision-making authority for this program	
Years of Experience in Position: 12	
Resume:	
<p>Denise is a certified Project Manager with over 12 years of experience working with government agencies. She has skills in all phases of the systems development life cycle and information systems management, development and customer service. Denise has a proven track record of accomplishments managing both Outsourcing and Systems Integration services. She possesses management, communication, analytical, technical, and quality management skills gained from business and technical experience in project management environments. During the past eight years, Denise’s career focus has been in project management and technical solution design in Health and Human Services Information Technology. Recent experience includes managing multi-million dollar application development and outsourcing contracts for federal and state and local government agencies, managing and motivating professional staffs, resolving critical situations for customers whose information technology applications and systems are large and complex and leading the quest for customer satisfaction by initiating new services.</p>	
<ul style="list-style-type: none">• Pertinent Professional Experience:	
Senior Program Executive/ Program Executive	
<p>Denise was instrumental in the development of the winning, “first-of-its-kind” solution that resulted in the award of an IBM prime contract with the Commonwealth of Pennsylvania. This Facilities</p>	

Denise Slusser – Program Executive

Management contract provides operational support on customer location for the Production, Development, Training and QA/Test environments for the Commonwealth's mySAP.com implementation across 53 agencies. The solution consists of over 85 servers in an AIX/NT environment that supports critical Commonwealth procurement, human resources, payroll and budgeting business processes. The multiple Tower team has achieved exceptional performance against challenging Service Level Agreements and business recovery objectives for the life of the contract.

Also for the **Commonwealth of Pennsylvania**, Denise managed a complex, multi-platform data center outsourcing contract consolidating multiple state agencies into a single data center. The scope included providing operational services for five mainframe platforms and three midrange platforms, technical services, network services, and help desk services for eleven unique agencies including the Departments of Revenue, Transportation, Labor and Industry, and Corrections. Denise manages a team of 85 IBM professionals and subcontractors in the delivery of these services. In addition, she had full responsibility for financial management, quality assurance, and contract administration and compliance. Her efforts achieve a high level of customer satisfaction and meet stringent service levels that varied for each customer.

Denise served as Project Executive for a data center consolidation project for the Office of the Chief Technology Officer in the **District of Columbia** with responsibility for planning, management, complex migration, and ongoing operations of applications from three data centers to an IBM managed operations facility in Lexington, KY. She executed a very aggressive schedule to migrate over 100 applications to a Year 2000 Ready infrastructure, while integrating business applications on a common platform with structured processes and tools. These highly critical applications included Unemployment Insurance processing, the University of DC student records and financials, processing of welfare checks, as well as AFDC and Food Stamps. This transition was accomplished with no loss of data and no interruptions or delays in the processing of benefits.

Denise's leadership ensured the on-time, on-budget design, development, and implementation of three major releases of the **North Dakota Welfare Reform Contract (RESPOND)**. In her capacity as Deputy Project Manager for Application Development she managed business analysts, information engineers and other technical staff through the analysis, design and installation of a two-tiered client server application. Her expertise in project management and information engineering was instrumental in the complex, rapid application development approach selected to expedite delivery. Results included consecutive 100% customer satisfaction ratings.

Delivery Executive

Government Industry Project Executive responsible for a variety of Strategic Outsourcing and Systems Integration programs in the Southeastern United States. In this role, Denise was responsible for ensuring her customer's satisfaction – customers who are primarily CIO's, IT Directors, and Department Heads. Her staff of Program Managers had responsibility for a variety of programs including tax form processing for the **State of North Carolina**, **Managed Operations for the State of Maryland**, **eGovernment for MiamiDade County** and a **Health Licensing System in the State of Florida**. She also serves as a consultant providing subject matter expertise for Social Services opportunities in the eastern United States.

- **Education and Training**
 - University of Maryland, College Park, Maryland
 - Frederick College, Maryland
- **Certifications:**
 - Project Management Institute, Project Management Professional Certification

Denise Slusser – Program Executive

- IBM Certified Professional Project Manager
- **Key Skill Sets:**
 - System life cycle development
 - Information systems management and customer service
 - Accomplished manager for Outsourcing and Systems Integration
 - Project Management
 - Technical Solution Design
 - Federal, State and Local Government
 - Motivates teams into action

Prior Account 1: Commonwealth of Pennsylvania

Reference: Beth Roose, Chief Information Officer, Pennsylvania Department of Transportation,
(717) 214-6209, broose@state.pa.us

Prior Account 2: District of Columbia

Reference: Suzanne Peck, Chief Technology Officer, District of Columbia, (202) 727-2277,
Suzanne.peck@dc.gov

5.3.2 Finance Manager

Jeromy Smith – Finance Manager
Account Team role: Finance Manager
<i>Jeromy was selected to be our Financial Manager based upon his experience with large Strategic Outsourcing Accounts.</i>
Major Responsibilities: <ul style="list-style-type: none">• Monitor and manage financial administration practices and procedures associated with the Agreement, including processing invoices, resolve financial issues,• Establish financial controls• Monitor budget performance, identify variances and recommend corrective action• Review charges and Performance Credits
Years of Experience in Position: 5
Resume: <ul style="list-style-type: none">• Pertinent Professional Experience: <p>Manager, Finance</p> <p>Jeromy currently serves as a personnel and finance manager for IBM Global Services. Jeromy manages financial analysts responsible for running measurements, forecasting, and budgeting for Strategic Outsourcing accounts. He works with IBM Headquarters to ensure strict compliance to accounting principles, and monitors and maintains an audit compliant environment. Jeromy also provides project management for account contractual issues.</p> <p>Business Unit Coordinator, Finance</p> <p>Jeromy coordinated inputs from sixteen accounts for the Vice-President of the Strategic Outsourcing Healthcare Industry. He developed monthly forecasts for the industry and performed annual budgeting and planning to achieve the industries business objectives. Jeromy also interfaced with accounting during monthly closeouts to ensure the organizations adherence to accounting principles.</p> <p>Financial Analyst</p> <p>Jeromy provided support for strategic outsourcing contracts providing financial analysis and counsel to the Project Executive, managed financials for a complex structure of five unique master agreements. He developed monthly forecasts and an annual planning budget for the account. In this position Jeromy facilitated the customer invoicing process.</p> <ul style="list-style-type: none">• Education and Training:<ul style="list-style-type: none">– Bachelor of Science, University of Utah– M.B., Business Administration, Marriott School of Management, Brigham Young University• Key Skill Sets:<ul style="list-style-type: none">– Attention to detail– Communication– Budget planning, forecasting and reporting– Contracts analysis



Jeromy Smith – Finance Manager

Prior Account 1:

Jeromy's experience has been on IBM accounts that are confidential in nature. References can be discussed upon request.

Prior Account 2:

5.3.3 Contracts Manager

<i>Jim Ohlhaber – Contracts Manager</i>	
Account Team role: Contracts Manager	
	<p><i>Jim was selected as our Contracts Manager based upon his experience with Federal, State and Local government contracts and his vast experience in Strategic Outsourcing contract relations.</i></p> <p>Major Responsibilities:</p> <ul style="list-style-type: none">• Provide advice and counsel regarding contract matters to the IBM VITA project team• Create, facilitate, and document business understandings with customers and business partners• Facilitate business understandings with suppliers• Manage negotiation and closure of IBM’s information outsourcing, consulting and other service agreements, focusing on State and Local Government public sector accounts
Years of Experience in Position: 25	
<p>Resume:</p> <ul style="list-style-type: none">• Pertinent Professional Experience: 25 years in the IBM Contracts & Negotiation profession in both commercial and Federal and State & Local contract development, negotiation, and management.• Education and Training:<ul style="list-style-type: none">– BA Catholic University of America– JD University of Baltimore School of Law• Key Skill Sets:<ul style="list-style-type: none">– Contract negotiation and administration	
Prior Account 1: State of Michigan MAIN Outsourcing Agreement	
Reference: Mr. Greg Faremouth, (517) 241-1646	
Prior Account 2: City of Chicago Parking & Administration Outsourcing Agreement	
Reference: Mr. Mathew Darst, (312) 747-0426	

5.3.4 Technical Service Tower Service Delivery Manager(s)

Donna-Rose Kupper –Delivery Project Executive

Account Team role: Steady State Service Delivery Manager



Donna-Rose was chosen to be the Commonwealth's Service Delivery Manager because of her consistent customer satisfaction ratings and her experience with delivering many different services.

Major responsibilities:

- Maintain positive customer satisfaction with the Commonwealth Partners' service delivery
- Work on-site in the PMO to keep abreast of project activities and respond quickly to production support problems
- Identify and allocate technical professionals to resolve critical situations or production support problems
- Own the delivery against defined performance standards and overall service quality
- Monitor the technical aspects of the service delivery including operations problem management and service delivery management
- Manage Cross Functional Services for the technical towers

Years of Experience in Position: 9

Resume:

Donna-Rose's areas of expertise include complex project management and delivery of outsourced computing services and process re-engineering. She is a PMI certified executive project manager with experience in management, IT outsourcing, new business development, contract development, negotiation and closure, account management, procurement and service delivery.

- **Pertinent Professional Experience:**

Service Delivery Manager

Most recently, Donna held the position as Service Delivery Manager for the Americas on a global, full-scope outsourcing contract for a large distribution company with presence in 58 countries. As a member of global management team, she met all her transition, financial, SLA, audit, and customer satisfaction targets.

At a major Finance Industry Account, Donna-Rose was responsible for delivery of US end-user support services under an outsourcing contract by matrix managing more than 50 delivery FTEs. Services included Help Desk, Desk-side support, and specialized depot services for 10,500 US end-users, including 6,000 at remote locations. Again, she exceeded all her financial and SLA targets.

Her experience includes delivery of technical support to a distributed systems environment including server, end-user machines, and LAN under another outsourcing contract, reducing cost in complex UNIX/NT environment. The client was a software development company with 22 sites in the US and Canada. Donna-Rose managed a team of 50+ individuals directly and through a matrix.

- **Education and Training:**
 - Fairleigh Dickinson University – Madison, NJ
- **Certifications:**
 - PMI certified Project Management Professional

Donna-Rose Kupper –Delivery Project Executive

- **Key Skill Sets:**

- Project management
- Service delivery
- Delivery team management
- Contract negotiation
- Procurement

Prior Account 1: AXA Financial

Reference: Charles Carroll, Sr. Vice President, 1290 Avenue of the Americas, New York, NY 10104,
(212) 314-2025

Prior Account 2: Diageo, PLC

Reference: David Bilger, Sr. Vice President Delivery, 801 Main Ave., Norwalk, CT 06851, (203) 229-
2142

Mike Walter –Service Delivery Manager-Security

Account Team role: Technical Tower Service Delivery Manager



Michael was selected to serve as Security Manager because of his recent experience managing centralized Security operations and intelligence for over two hundred IBM customers including government agencies.

Michael has had a dynamic security career having worked in diverse security environments. His leadership in this field is evidenced by his three patents.

Major responsibilities:

- Day-to-day security oversight for the Security Services.
- Running the Commonwealth’s eSOC
- Managed Security Services – Prevention, detection and response to security threats and attacks. Collection, analysis and dissemination of pertinent security information. Management of security vulnerabilities, and security risks.
- Business Controls Services – Creation and approval of the Security Controls Policy Document (GSD331). Continuously measuring and reporting compliance to security policy.
- Security Identity and Access Services – Deployment and maintenance of people, process and technology for centralized user id administration.
- Strategic Security Framework for measurement and incremental improvement of Security Posture.

Years of Experience in Position: 9

Resume:

- **Pertinent Professional Experience:**

Chief Architect, Security Intelligence

In this role Michael was in charge of a team with the responsibility of collection, analysis and dissemination of Information Security data generated by advanced business intelligence techniques including data warehousing and mining. He ensures that the department produces information that is used to make critical business decisions from raw data collected by IBM’s Managed Security Services; a global business responsible for IBM’s information security as well as Strategic Outsourcing, e-Business hosting, and Commercial customers.

Special Assignment, Intrusion Detection

Michael led the largest architecture and deployment of Tivoli Risk Manager for Security Event Management (SEM). Michael was responsible for ensuring that the SEM infrastructure could handle security events from over 1,000 network intrusion detection sensors and 1,000 host intrusion detection sensors and worked with over a dozen IBM teams to ensure end-to-end consistency, reliability, and scalability for this highly complex infrastructure.

Chief Architect, Security Operations Center

Led a team of level one and level two analysts in the Security Operations Center by implementing a roadmap for “people, process & technology” and then driving all initiatives to conclusion. Drove efficiencies in the Security Operations Center in order to drastically labor costs.

Publications

IBM Security Threats and Attack Trends (STAT) Monthly Newsletter – IBM’s Threat Service, July

Mike Walter –Service Delivery Manager-Security

2004

Presentations

Business Intelligence in Information Security – SHARE Technology Conference – February 2004

Intrusion Detection Best Practices – Empire Credit Union Conference – June 2004

Social Engineering – Empire Credit Union Conference – June 2004

Patents

Applying Blocking Measures Progressively to Malicious Network Traffic – May 2003

Reverse Signature Matching – November 2003

Attack Source Profiling – patent pending

- **Education and Training:**
 - B.S., Computer Science, University of Colorado
 - Masters in Engineering, University of Colorado
- **Key Skill Sets:**
 - Intrusion detection
 - Business intelligence in Information Security
 - CISSP and Vulnerability Management
 - Security Information Management Infrastructure
 - Security Intelligence

Prior Account 1:

Providing security monitoring and management of US government agencies that cannot be named due to security concerns.

Prior Account 2:

Providing security monitoring and management of US government agencies that cannot be named due to security concerns.

Mark Latham – Service Delivery Manager – Help Desk

Account Team role: Technical Tower Service Delivery Manager



Mark was chosen to lead the Help Desk development, transition and steady state activities due to his extensive experience providing customer care solutions to a wide array of clientele.

Major responsibilities:

- Transitioning existing Agency Help Desks to the new SPOC Help Desk while meeting stated Transition objectives
- Meeting and exceeding contracted service levels and other SOW requirements
- Incorporating future support requirements into the Help Desk by working closely with Agency CIOs
- Participating in planning meetings and sitting on committee's as required
- Aligning the Help Desk with the Commonwealth's business goals and objectives
- Set up the Vendor Help Desk, including implementation of systems necessary to document, track and manage End-User Service Requests, inquiries and Problem notifications
- Provide a single point of contact and coordination for all Incident reports and requests for information and Service (e.g., IMACs) in the Towers supported under this SOW
- Provide Level 1 assistance to inquiries on the features, functions and usage of hardware and Software per the Help Desk Supported Hardware and Software Appendices
- Identify, escalate (e.g., Level 2 escalation), manage resolution and close Incidents
- Manage the Root Cause Analysis process on recurring Incidents
- Perform administration Services such as creating, changing and deleting End-User accounts
- Coordinate Service delivery with Help Desks, as well as other support groups within each of the other Towers in coordination with Eligible Customers, VITA, and all appropriate third parties, as necessary
- Assist, as reasonable, Commonwealth residents who have called the wrong Help Desk.
- Provide VIP Support Services as necessary

Years of Experience in Position: 20+

Resume:

Mark Latham has more than 20 years experience with IT and Customer Support outsourcing contracts and has over fifteen years of management leadership and development in the Customer Support industry. Mr. Latham has spent more than twenty years in Customer Care operations and is considered a person that can execute change. In Mr. Latham's most recent experience, was developing a customer care center for more than 50,000 customers. He also during this same time became the manager of the education team and of the solutions development team. Mr. Latham is the key player bringing about successful implementations, engagements as well as any other operational changes.

- **Pertinent Professional Experience:**

- Customer Care Solutions*

- Creates solutions for public/private partners with more than 40,000 customers
- Enhances steady state customer service to increase productivity by 22% and decrease turnover by 12%
- Continuously sets, meets, and exceeds expectations by being the partner liaison for the

Mark Latham – Service Delivery Manager – Help Desk

largest Customer Care Centers

- Creates staffing models for new and existing customers
- Designs and implements the Account Management model
- Subject Matter Expert for IT and Customer Support operations

Education Division

- Leads the certification and education team
- Measures and drives the operational performance for all certification
- Creates and Facilitates Customer Support curriculum

Consulting

- Integrates consulting team into outsourcing contracts
- Managed the Customer Support environment
- The I.T. budget for 1997 was over 1 billion dollars, supporting 85 million dollars in capital equipment, 330,000 employees, 155,000 external customer systems, 75,000 vehicles with cellular/radio communication equipment, and over 1800 locations
- Worked on committee for Changing I.S. Costing Structure

- **Education and Training:**

- Bachelors of Science, Computer Science, University of Central Florida with a Minor in Accounting

- **Certifications:**

- Certified Help Desk Director Instructor
- ITIL certified
- Numerous Recognitions/Awards for Performance, Customer Service and Leadership

- **Key Skill Sets:**

- Creating results
- Leadership skills
- Establishing trust
- Communicating a positive image
- National Speaker on Customer Support

Prior Account 1: Alcoa, 100 Technical Drive, New Kensington, PA 15069

Reference: Carl Johnson, Help Desk Manager, Carl.Johnson1@alcoa.com, (724) 337-2111

Prior Account 2: Fannie Mae, 13150 Worldgate Drive, Herndon, VA 20170

Reference: Rebecca Lewis, Director CSC, rebecca_lewis@fanniemae.com, (703) 833-5770

Michael Fein – Service Delivery Manager Desktop Computing

Account Team role: Technical Tower Service Delivery Manager



Michael was selected to serve as the Desktop Computing Service Delivery Manager because of his extensive experience in desktop and distributed computing.

Major responsibilities:

- Manage Desktop Service Delivery Team
- Implement new service delivery processes and practices
- Ensure high level of customer satisfaction with IBM services

Years of Experience in Position: 15

Resume:

Michael's most recent expertise included management of a team of software technicians for large enterprise customer in the manufacturing industry. Services covered 3 sites in the United States to over 6,500 End Users. In addition acted as Distributed Services Competency Subject Matter Expert for all new business activity.

• Pertinent Professional Experience:

Managed team of software technicians for large enterprise customer in the distribution industry. Services covered 3 large US sites with 7,500+ End Users.

Managed team of Project Managers and technicians providing add, change customization to desktop computing hardware and software products.

Managed, designed and wrote the processes, methods, procedures and project managed the install, move, add and change service for large telecommunications enterprise. Project covered 5 states and 30,000 devices.

• Education and Training:

- University of California, Berkeley BA

• Key Skill Sets:

- Management & coordination of delivery resource
- Performance management
- Project Management

Prior Account 1: Lexmark

References: Bob Stokes, Lexmark Delivery Project Executive, bmstokes@us.ibm.com, 859-232-4757
Bob Brauer, Lexmark Project Executive, brauer@us.ibm.com, 859-232-2686

Prior Account 2: Sears

References: Linda Koch, Delivery Project Executive, lakoch@us.ibm.com, 305-500-4068
Timothy Hull, Project Executive, timdhull@us.ibm.com, 224-405-2088

Brenda K. Holder –Service Delivery Manager- Messaging

Account Team role: Technical Tower Service Delivery Manager



Brenda was selected to serve as the steady state Operations Lead for Messaging because of her deep technical and program management experience leading large-scale service delivery programs for a variety of clients.

Major responsibilities:

- Manage Messaging Tower from an Operations perspective
- Work closely with Messaging Transition Lead between operations of legacy environment and new solution environment
- Assist Transition Lead with consolidation and centralization into high availability Microsoft Exchange environment
- Recommend services and standards for supporting the VITA Messaging Services business requirements and platform standards
- Work with appropriate IT service delivery personnel to perform the installation, testing, and tuning of all technical environment hardware, Software, peripherals and interfaces related to supporting messaging platforms
- Provide problem determination and resolution
- Coordinate Service delivery with Help Desks, as well as other support groups within each of the other Towers in coordination with Eligible Customers, VITA, and all appropriate third-parties, as necessary
- Identify possible Service enhancement opportunities for improved performance and potential cost savings

Years of Experience in Position: 14

Resume:

- **Pertinent Professional Experience:**
 - **Regional Program Manager** – Managed more than 200 Service Delivery personnel throughout North & South America supporting desktops, LANs and infrastructure servers. Managed as a commercial service offering with formal Service Level Agreements. Infrastructure servers included day-to-day operations for Messaging servers such as Project.Net (workflow), Sametime (Instant Messaging) and Post.Office (email). Email environment supported more than 17,000 users. Also managed team responsible for email server consolidation from Post.Office/Exchange to SunOne iPlanet Messaging for 12,000 users.
 - **Data Center Manager** – Managed data center System Administrators, DBA's and 7 x 24 Operations team responsible for day-to-day support of a wide variety of application and infrastructure servers including Messaging servers.
 - **Systems Team Lead** – Managed team of 30 System Administrators and DBA's. Also managed large number of windows server consolidations including consolidation of decentralized Post.Office email servers into centralized email server.
 - **Project Lead** – Managed Novell to NT Migration and GroupWise to Exchange migration for Colorado Interstate Gas.
 - **Systems Engineer** – Lotus Notes System Administration, NT Server Administration, Citrix Winframe Server implementation in cluster/load balanced environment for use with PeopleSoft, Y2K testing for all infrastructure applications, OS and hardware.

Brenda K. Holder –Service Delivery Manager- Messaging

- **Network Specialist** – Exchange Server Administration and Account Management. Also developed SLA’s for Service Desk.
- **Systems Analyst** – Support Novell servers and desktop support. Implemented Symix Manufacturing system; provided Software Training to all users.

•

- **Education and Training:**

- **University of Houston 1992**
- **Professional Development:**
 - People Management
 - Finance for Non-Financial Managers
 - Advanced Negotiations
 - Unlocking Customer Value

- **Key Skill Sets:**

- Understanding of Technology
- Excellent Communication
- Customer Service Focused
- People Motivation
- Service Delivery
- Operations

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Prior Account 1: Schlumberger

Reference: Roy Coe, coe@montrouge.oilfield.slb.com, (011) 33-1-4600-6012

Prior Account 2: Coastal States Management (El Paso Energy)

Reference: Dan Rizzo, dan.rizzo@elpaso.com, 713-420-1506 or 713-816-9825

Chad Wirz – Service Delivery Manager – Mainframe/Server

Account Team role: Technical Tower Service Delivery Manager



Chad was selected to serve as the Mainframe Midrange Technical Tower Manager because of his recent experience managing a 3200 server environment, coordinating System Administrator functions. Responsibilities included ongoing support, system refresh, new project work, and problem resolution.

Major responsibilities:

- Take ownership of the day-to-day operational relationships to ensure the delivery of the Services to meet the business requirements of the Commonwealth and its Eligible Customers
- Manage and coordinate the appropriate Commonwealth and Vendor resources across all information technology Services, including resources and Services provided by the Vendor, to ensure optimal Service delivery and ensure that all issues raised are resolved in accordance with the applicable Service Levels
- Coordinate with the Performance Manager(s) to ensure the ongoing delivery of support and attainment of Service Levels for the Commonwealth and its Eligible Customers. In addition, monitor business volumes to ensure Service Level reporting accuracy
- Implement and co-ordinate the management reporting processes for committed Service Levels
- Resolve disputes between the Eligible Customers and the Vendor where appropriate, and take escalation actions as necessary
- Review Root Cause Analyses, Incident, and Problem reports, establish the corrective actions to be taken, and oversee tracking of correction actions to completion
- Provide operations support assistance to aid in successfully achieving the objectives set in the SOWs and the Agreement

Years of Experience in Position: 6

A proven leader, with 11 years of management experience, Chad has held positions of increased responsibility in his military and technical career. He is able to understand customer requirements and deliver a technical solution to meet the need.

- **Pertinent Professional Experience:**

Unix and Intel Server Manager

Managed a team on the Honeywell account whose mission is to provide enterprise wide planning, coordination, communication and documentation for all Unix and Intel System Administrators. Led in the efficient execution of tasks, assuring service was delivered consistently across multiple geographies and businesses, and represented the organization for enterprise wide projects affecting approximately 3200 servers.

While at **Honeywell**, Chad managed a team that provided Server Administrator support for a region of Unix and Intel servers. Achieved high customer satisfaction by understanding Honeywell's businesses, proactively meeting business requirements, and reacting with a sense of urgency when needed.

Chad participated in transitioning AlliedSignal employees into IBM as a new IBM manager in 1999,

Chad Wirz – Service Delivery Manager – Mainframe/Server

and then filled a leadership role in transitioning Honeywell employees into IBM in 2001. Also served as an adviser on several other outsourcing projects.

Network Architecture Leader

As an employee of **AlliedSignal** (before the acquisition of and name change to **Honeywell**), Chad led a team that was responsible for Systems Administration of Intel servers and network infrastructure (router, switch, hub, wiring). The 13 sites involved 70 servers and 3000 seats which supported the Polymers division. This team designed, installed, configured, and provided ongoing support of the environment.

Network Engineer

As a contractor to **AlliedSignal**, Chad was the Team Lead of the Intel Systems Administrators/Engineers for the above mentioned environment. Oversaw and participated in call queue monitoring, server maintenance, on call support, and new server design and installation. Prior to becoming the steady state lead, Chad was a team member who converted many of the businesses servers from DEC/VMS to Intel based servers.

Surface Warfare Officer

While in the **United States Navy**, Chad led departments with various responsibilities. Consistently ranked a top performer.

- **Education and Training:**
 - B.S. in Computer Science, Texas A&M University, College Station, TX
- **Key Skill Sets:**
 - Service Delivery
 - People management
 - Customer communications
 - Critical Situation resolution

Prior Account 1: Honeywell

Reference: Linda Anderson. Linda.Anderson2@Honeywell.com. 480-592-5264.

Prior Account 2: Honeywell

Reference: Randy White. randy.white.olatheis@honeywell.com. 913-712-2063.

Kelly Mire – Key Executive & Service Delivery Manager -Network

Account Team role: Key Executive; Service Delivery Manager – Network (Data, Voice & Video) Steady State



Realizing that extensive knowledge of VITA’s organization and operations, coupled with extensive experience in Infrastructure is highly critical to the success of the VTT Program, Kelly was chosen not only to be a member of the Key Executive Team, but also to serve as the lead for the steady state network operations. In addition to these responsibilities, Kelly will also provide oversight for all infrastructure activities for the network, helpdesk, and messaging towers.

Major responsibilities:

- Provide executive leadership and vision for the VTT program
- Key member of the Commonwealth Partners Executive Team
- Key Member of the Commonwealth Partners Program Management Office
- Provide overarching leadership for the Network, Helpdesk and Messaging towers
- Develop and document Network provisioning, engineering, design, requirements and policies, in accordance with Procedures Manual
- Provide and implement tools for monitoring performance, capacity and availability of Network devices and traffic
- Implement measures for proactive monitoring and self-healing capabilities to prevent Service interruptions
- Provide capacity, performance and service level reports on a monthly basis or as needed
- Provide Voice and Video Telecom Services design and engineering to meet Commonwealth strategies and requirements
- Provide fraud prevention, detection and reporting and VIP Support Services

Years of Experience in Position: 18+

Kelly is a Managing Director in the Infrastructure Solutions practice of BearingPoint with over 18 years experience, enabling organizations to maximize the value of their Information Technology (IT) infrastructure. He leads a Mid-Atlantic based team of experienced and certified professionals, providing services to clients in all vertical markets, with specific emphasis on State and the Federal Government, delivering solutions across the entire lifecycle methodology, including Strategy, Planning, Design, Implementation, and Operations. He retains a broad knowledge base of voice, video, and data communications technologies, and specializes in engagements of IP Telephony, infrastructure rationalization & consolidation, and managing large-scale technology deployments.

Resume:

- **Pertinent Professional Experience:**

Kelly has performed and/or provided leadership for a number of IT Infrastructure Transition projects, including:

- Established a Program Management Office to assist a global telecommunications service provider refresh their WAN supporting internal IT functions. Some of the specific deliverables included PMO framework, ROI tool, risk mitigation strategy, detailed implementation work plan, and network design.
- Provided design and implementation guidance for a 4,000 node campus LAN at a Virginia

Kelly Mire – Key Executive & Service Delivery Manager -Network

Public College. Project specifics include a complete cable plant installation, Ethernet workstations on an ATM backbone, Internet access, IP firewall, remote access, analog video network, and ISDN Centrex services.

- Deployed nearly 8,000 workstations at over 500 community labs across the US and Puerto Rico for a non-profit entity focused on bridging the digital divide. Performed site assessments, site preparation assistance, centralized equipment staging / configuration, deployment, and help desk services.
- Provided leadership of an assessment and architecture plan for a large private school system. Kelly developed planning services to effectively control the organization's rapidly growing voice, video, and data networks.
- Responsible for a team of consultants currently executing a multi-year transition of telecommunications services for a large State government.
- Deployed fiber optic cable at six coal-fired power stations for a regional electric utility as part of a larger project to implement emissions monitoring equipment. Mr. Mire managed the installation of the cable plant during the 12-month project, utilizing multiple installation crews.
- Managed the installation of a large, regional bank's SMDS WAN, including coordinated circuit installation, associated equipment installation, troubleshooting, billing, and record keeping.
- Managed the installation of a large, regional bank's videoconference system and associated ISDN network. In addition, Mr. Mire managed the resolution of a manufacturer's software bug that was discovered during the implementation.
- **Education and Training:** BS in Electrical Engineering from Clemson University with a concentration in Data Communications. In addition, Kelly has attended numerous industry related courses and seminars from various manufacturers, American Research Group, and other institutions.
- **Certifications:** South Carolina Board of Registration for Professional Engineers
- **Key Skill Sets:**
 - Access / Transport Experience
 - Network Expertise
 - Program Management
 - CISCO Hardware
 - OS Knowledge

Prior Account 1: North Carolina Rural Economic Development Center, 4021 Cary Drive, Raleigh, NC 27610

Reference: Jane Patterson, Executive Director, jane@ncruralcenter.org, (919) 250-4314

Prior Account 2: Virginia Information Technologies Agency, 110 South 7th Street, Richmond, VA 23219

Reference: Cheryl F. Clark, Deputy Chief Information Officer, cheryl.clark@vita.virginia.gov, (804) 343-9003

5.3.5 Other Key Account Team Management Personnel

Danny Teaff – Lead Architect	
Account Team role: Lead Architect & Internal Applications Service Delivery Manager	
	<p><i>Our Lead Architect was selected based on the breadth and depth of his experience in managing complex solutions from inception to successful implementation</i></p> <p>Major responsibilities:</p> <ul style="list-style-type: none">• Manage and validate the overall technical viability of each discrete project• Apply his broad understanding of advanced technology to implement the program requirements• Lead the development of materials, tools, and approaches for architecture activities• Maintain the architecture work plan, staffing, status reports, and scheduling• Focus specifically on:<ul style="list-style-type: none">– Systems architecture– Infrastructure implementation– Full lifecycle implementation– Environment maintenance and operations
Years of Experience in Position: 27	
Resume:	
<ul style="list-style-type: none">• Pertinent Professional Experience: <p>With more than 27 years experience managing, designing, developing, testing, and supporting large-scale information systems, Danny provides technical architecture and leadership for large, complex systems. In this role, he has full lifecycle experience, plans projects, performs system architecture and design, and supports technical proposals. He was also instrumental in his organization being assessed as SEI CMM Level 3 compliant and led a project that achieved ISO 9001 certification. In addition, Danny has chaired the Technical Architecture Board and Solutions Process Council within the IBM Public Sector.</p> <p>IT Architect.</p> <p>To support explosion of medical imaging content, IBM is offering the Grid Enabled Medical Archive Solution (GMAS) solution to provide an enterprise-wide storage grid that enables providers to share storage resources while facilitating data federation, disaster recovery, and global application access across local and remote sites. Danny defined the storage services required for GMAS deployments, created Statements of Work for the end customer and for the Bycast StorageGRID vendor. Danny also provided information for approval of open source components of the solution.</p> <p>BioSense is the Center for Disease Control's (CDC) initiative to have one public health information network to track and respond to a bioterrorist thread or act. Danny created the logical and physical architecture diagrams for IBM's proposed solution. Integral software components defined for the solution include WebSphere Health Care Collaborative Network, WebSphere Business Integration (WBI) Message Broker, WBI Server Express, WebSphere Application Server, and DB2 Universal Database, DB2 Data Warehouse, WebSphere Information Integrator, and Microsoft Clustering</p>	

Danny Teaff – Lead Architect

Services. In addition, the Unstructured Information Management System (UIMA) and EpiSPIRE software from the Research Division were included as components. Technical presentation materials were provided for management and customer reviews.

Payor Services Offering (PSO) was formed to meet the needs of large commercial and government health care insurance payers. The client needs addressed by the PSO included reducing administration costs per claim, moving from multiple claims application to a single solution, improving auto-adjudication rates, introducing of new technology, improving roll-out of new products, and providing outsourcing for additional cost savings.

Danny led the IBM development team in moving the deNovis claims application to IBM technology. He coordinated the migration from non-IBM middleware to WebSphere, DB2, and Tivoli security products. The system was also from rehosted to IBM hardware platforms including pSeries and blade servers. Danny worked on definition of the hardware and software topology. In addition, for migration to IBM technology, he was the technical liaison with the IBM Software Group brands to address problem resolution, release upgrades, and training.

As the IBM architect, Danny wrote the Non-Functional Requirements document and authored sections of the Systems Architecture Specification. Performing the design tasks, Danny was primary author of the Scalability and Fail-over Specification, designed Web Server clustering, and designed High Availability for single point of failure components. In addition, HACMP was configured and high availability scripts were written. Danny also authored the Electronic Data Interchange (EDI) Gateway Architecture Specification. A file listener adapter was written to receive inbound EDI files and send outbound EDI files. Danny also authored the Data Plan for Performance and Stress Testing. Java software was written to generate large numbers of EDI 837 claims records.

Leading the IBM team in design and construction of Systems Management capabilities, he also implemented Systems Monitoring for all components, including the operating system, application server, database server, directory server, MQ servers, security server, and the claims application. Installation and configuration was performed for several BMC PATROL products.

In support of IT outsourcing, Danny defined the services and requirements for the health care claims solution. He served as the primary interface with the Application Service Provider (ASP) for hosting within an IBM Solutions Delivery Center. In addition to defining managed software and hardware, managed hosting capabilities were defined for disaster recovery, backup and restore, systems monitoring, security, and facilities.

Throughout this project, several technical briefings were provided to new and potential customers.

To support reinventing education initiatives, the **Teacher's WorkPlace** project was formed by the IBM Research Division to create teaching portfolio templates, create portfolios, and support asynchronous discussion for feedback. Danny was brought onto the project by IBM Research to refine the systems architecture. He created a Non-Functional Requirements document for the project. An Architecture Specification focusing on scalability and fail-over was created. A physical architecture was also created that included all hardware and software components. Danny provided recommendations on hardware models and quantities for selected customer profiles. In addition, he supported technical briefings with customers.

State of New York Department of Labor needed to modernize its Unemployment Insurance System, and move from manpower intensive operations to more automated, electronic solutions. Danny worked on the design of a Tax Rate Reassessment proof of concept using the Cúram reference model. Based on the mock-up screens that were constructed, the list of required data items was compiled and mapped to entities in the reference model. An object model was created. Class process documents

Danny Teaff – Lead Architect

were also created that defined the methods, pseudo code, and test considerations.

High Performance Storage System (HPSS) was formed to meet the customer requirements for large data capacities and scalable parallel storage. With the advent of large multi-processor computers and grand challenge problems, many of the world's largest computing centers (government laboratories, research centers, and universities) required advanced storage solutions. Danny was assigned to lead the HPSS project, and coordinated all IBM and collaboration team members from 5 major Department of Energy laboratories. As the technical leader, he served as chairman of the HPSS Technical Committee. The scope of these responsibilities extended across the full lifecycle from project inception through production delivery including requirements definition, architecture specification, software design, construction, system test, and rollout. In addition to leading each of the lifecycle phases, Danny was the primary requirements author, contributed design, performed software development, and performed System Test. He also prepared basic and advanced training materials and taught several classes on HPSS. Danny worked on many successful proposals that included HPSS in the solution. He also served on the corporate wide StorageBlue team to define future initiatives in storage.

Danny also was Project Lead for multiple projects for **National Aeronautics and Space Administration (NASA) Johnson Space Center, including Space Station Mission System Contract (MSC), and Ground Based Systems – Workstation Executives and Near Real-time Telemetry**. He served as chief software architect for the **Space Station MSC** project.

- **Education and Training:**
 - M.S., Mathematics, minor in Computer Science, Texas Tech University
 - B.S., Mathematics, minor in Computer Science, Texas Tech University
- **Certifications:**
 - IBM certified Executive IT Architect
 - **Training:** OOAD and Rational Rose Fundamentals, Enterprise JavaBean Development for WebSphere, EJB 2.0 / J2EE Development Using WebSphere Studio, Java 2 Programming, J2EE Web Services Support / Security / Tools
- **Key Skill Sets:**
 - Project Domain: Systems and Application Architecture, Systems Integration, Application Development
 - Hardware: IBM pSeries, IBM xSeries, IBM blade servers, Sun, PCs, IBM tape libraries, IBM disk and tape storage devices, StorageTek tape libraries, Storage Area Networks
 - Operating Systems: Unix, AIX, Linux, Sun Solaris, Windows, MVS
 - Computer Languages: Java, C, PL1, COBOL, FORTRAN
 - RDBMS: DB2
 - Development Tools: Rational tools
 - Applications: Microsoft Office, Lotus SmartSuite, GS Risk, WebSphere Application Server, WebSphere MQ, WebSphere Data Interchange, BMC PATROL, Tivoli Access Manager, HACMP

Danny Teaff – Lead Architect

Prior Account 1: Lawrence Livermore National Laboratory

Reference: Mark Gary, Group Leader, mgary@llnl.gov

Prior Account 2: Los Alamos National Laboratory

Reference: Danny Cook, Group Leader, dpc@lanl.gov

Don L. Parr – Communications and Program Management Executive

Account Team role: Key Executive



Major responsibilities:

Realizing that effective and timely communications is a critical part of the transition, Don was selected based on his vast knowledge of VITA's organization, operations, policies, and procedures. Don's responsibilities will include:

- Planning executive-level communication both external to and internal to the VTT Program
- Providing executive leadership and vision for meetings, reporting, and communiqués that will occur with the client sponsor, subcontractors, the project team, and the performing and delivery organizations' management
- Providing executive leadership and vision for the Communications Management plan
- Key member of the Commonwealth Partners Executive Team
- Key Member of the Commonwealth Partners Program Management Office

Years of Experience in Position: 21+

Resume:

Don Parr is a Managing Director in BearingPoint's Public Sector State and Local Government practice. He is responsible for the Commonwealth of Virginia Account.

Don has experience with engagements that include enterprise package solutions, program management, and large-scale custom information system development projects. In addition, he has worked with clients to develop project management controls and infrastructure for enterprise-wide project planning and statewide transformation initiatives.

- **Pertinent Professional Experience:**

Engagement Managing Director

As the Engagement Managing Director, Don was responsible for the transformation of a state government from a decentralized environment to a single central organization. The project involved all aspects of technology including people, process, and infrastructure assets.

Don also served as Engagement Managing Director for projects to implement a licensing/inspection application for state social services agency, ERP planning phase for state department of corrections, and on an Executive Review of the Information Technology vision and approach for state transportation agency.

Project Manager

In his role as a Project Manager, Don developed as strategy to implement SAP across an entire state agency for an Enterprise Resource Planning engagement. He also developed an electronic government strategy for BearingPoint's Public Sector State and Local Government Practice.

Engagement Manager

Don has performed Engagement Management services on a number of projects. He was the Engagement Manager as well as the relationship manager for one of the world's largest tobacco manufacturing companies. He has also worked in this position with the CIO of a large distribution company on a planned migration to client/server. He was also instrumental in developing an enterprise

Don L. Parr – Communications and Program Management Executive

project office facility for a large distribution company. This facility was the central point of project planning and communication for the company's information systems projects.

Implementation Manager

Don also as Implementation Manager for a new Citizens Services system for a department of motor vehicles. In this role, he also implemented financial systems for a department of public education.

Project Manager

As Project Manager for a state housing development authority, Don migrated this agency to Windows NT. This project dealt with structuring the project team, identifying roles and responsibilities, managing issues, and identifying any ancillary projects that needed to be addressed as a result of the migration. Don also implemented a Microsoft Exchange Electronic Mail System for this agency.

- **Education and Training:**

- Bachelor of Business Administration in Management Information Systems from James Madison University

- **Certifications:**

- BearingPoint Certified Project Manager
- SAP Certified

- **Key Skill Sets:**

- Project Management/Program Office
- SAP
- e-Procurement
- e-Strategy
- Electronic Government Portals
- Large application development projects

**Prior Account 1: Virginia Information Technologies Agency, 110 South 7th Street
Richmond, VA 23219**

Reference: Cheryl Clark, Deputy Chief Information Officer, cheryl.clark@vita.virginia.gov, 804-343-9003

**Prior Account 2: Virginia Department of Corrections, 411 East Franklin Street
Richmond, VA 23219**

Reference: Linda Smithson, Enterprise Service Director for Education and Natural Resources Secretariat, linda.smithson@vita.virginia.gov, 804-343-9053

Michael Puckett – Human Resources Manager

Account Team role: Human Resources Manager



Michael was selected as the Human Resources Manager for the Commonwealth Partners because of his vast experience in the Human Resource Management field during a sixteen year career.

Major responsibilities:

- Develop a Human Resources solution commensurate with the Commonwealth's requirements and Commonwealth Partners' abilities
- Design a communication plan with VITA and the Commonwealth Partners Communication and Change management team for VITA Affected Employees
- Inform VITA Affected Employees of the Commonwealth Partners Human Resources policies and procedures
- Hold sessions with the VITA Affected Employees on compensation and benefits programs
- Work to minimize the anxiety of transitioning employees
- Facilitate the smooth transition of employees to the Commonwealth Partners' organization

Years of Experience in Position: 16

Michael is an IBM Human Resources Executive responsible for developing people solutions for IBM engagements and managing the execution of those solutions. He has an outstanding record of providing Human Resources strategies based upon insight into the needs of employees and a vision of what makes employees happy and successful in their work environment. Michael has the distinction of being an employee affected by a transition when his company was acquired by IBM in the late 1990's. Michael has built a successful IBM career which includes several diverse assignments as described below.

Resume:

- **Pertinent Professional Experience:**

Human Resources Executive

Michael develops and manages the execution of Human Resource solutions for IBM Global Services on external IBM outsourcing contracts. The solutions include developing communication strategies and communications for the affected employees jointly with the client or customer. Michael also manages the activities associated with informing new employees of their benefits, company policies, opportunities and education.

Human Resources Manager

Michael served as the Human Resources Manager for an IBM Software Development Laboratory in Winchester, England. He developed a Human Resources strategy for over 3,000 employees of the Lab. The strategic leadership provided by Michael included a road map for employees and technology that brings value to IBM. Michael led a team of five Human Resource professionals to attract, motivate and retain staff.

In his career as a Human Resources Manager, Michael has developed and deployed new compensation programs for employees related to salary increases to remain competitive in a global market and to expand the use of existing programs to retain critical skills staff. Michael has participated in developing and deploying a new job family, IT Architect which offers career advancement for IBM's



Michael Puckett – Human Resources Manager

IT professional staff through education, experience and certification.

Michael has served as the project leader for the transition of his company’s employees to IBM, directing a team of 25 staff for a successful transition with little or no impact to employees. He has led a Human Resources team of professionals providing over 6,000 people with Human Resources services, including compensation structure and merit design, development of company success sharing bonus programs, benefits counseling, policy and practices deployment, health and safety guidelines/awareness, and security affairs. Michael has also written newsletters, brochures and handbooks for employees informing them of benefits and rewards programs offered by their employer.

- **Education and Training:**
 - B.S., Personnel Management, Eastern Illinois University
- **Certifications:**
 - American Compensation Association (ACA) Certified Professional
 - Society of Human Resources Professionals
- **Key Skill Sets:**
 - Insight and vision of HR needs including personnel management, staffing and organizational development
 - Leading all people aspects of business transitions, mergers and acquisitions
 - Extensive experience in managing compensation and benefits programs
 - Innovative leadership of employee and industrial relations

Prior Account 1: CIGNA

David Wildfeuer, Vice President of Human Resource Operations, david.wildfeuer@cigna.com, (215) 761-4658

Prior Account 2: CIGNA

Carole Pirozzi, HR Manager, carole.pirozzi@cigna.com, (215) 761-1960,

Karen Farwell – Change Management

Account Team role: Communications Manager



Realizing that effective and timely communications is a critical part of the organizational change management during a large-scale transition, our Communications Manager was selected based on her vast experience providing leadership and change management for complex transformation programs. Karen's responsibilities will include:

Major responsibilities:

- Overall accountability for achieving Change Management results as defined by Change Management metrics
- Build and execute plan to achieve desired Change Management outcomes utilizing tools, techniques and Best Practices in Communications, Leadership and Training:
 - Business Ownership & Leadership Alignment
 - User Readiness & Adoption
 - Organizational Alignment

Develop and continuously improve Change Management toolkit

- Ensure consistent application of Change Management plan and tools across transition projects and overall program
- Develop Change Management skills and expertise within project- and client- teams
- Ensure client satisfaction with Change Management activities and results

Years of Experience in Position: 15+

Resume:

- **Pertinent Professional Experience:**

Solution Development

Karen led the development and deployment of communication strategy for a Fortune 100 insurance provider in the process of implementing their new corporate and product strategies, supported organizational alignment assessments and change management work streams.

She also developed transition and implementation plans for the first branch banking/sales automation initiative at a major government-owned Canadian financial institution. Additionally, Karen guided client resources in developing a strategic communications plan.

Karen acted as lead on the development of systems requirements for a sales tracking and reporting system at a major global financial institution as well as taking responsibility for re-designing the sales organization reporting structure.

Systems Implementation

Karen designed the internal communications function and acted as executive coach to senior executives of a global software provider. She led the deployment team for global workforce restructuring, selected resources, identified risks and mitigation strategies, and supported the Program Management Office.

On another project, Karen prepared senior leadership of a global professional services provider to implement new corporate strategy and alignment of the organization. She worked with functional and cross-functional teams having an emphasis on program management, change strategy and structure,

Karen Farwell – Change Management

and determining critical projects.

- **Education and Training:**
 - Masters in Strategic Management and Organizational Behavior
 - Professional Development
 - Membership and participation in Academy of Management
 - Membership and participation in Organizational Development Network
- **Key Skill Sets:**
 - Complex Program Management
 - Strategic Planning and Execution
 - Organizational Transformation
 - Strategic Change Management and Communications
 - Organizational Alignment and Design
 - Leadership Coaching and Development

Prior Account 1: Honeywell Aerospace & Defense – Change Management Lead for Global Technology Transformation

Reference: Marc Szczerba, Executive Vice President, Backbone Transformation Program. 602-365-2180

Prior Account 2: VITA – Change Management and Program Lead roles for stand-up and 100 day plan of new agency

Reference: Cheryl Clark, Deputy Chief Information Officer, cheryl.clark@vita.virginia.gov, 804-343-9003

5.3.6 Other relevant personnel

Rox Ann VanPool – Deputy Program Executive

Account Team role: Deputy Program Executive



Our Deputy Program Executive was selected based upon her experience and success in managing large complex IT projects, leadership skills, record of accomplishments and customer satisfaction.

Major responsibilities:

- Work closely with the Relationship Manager and manage the relationship in her absence
- Work with the Program Office Manager and the project managers to facilitate project tasks, deliver cross functional services, produce high quality deliverables and meet service levels
- Focus on the day-to-day management and interactions between the Commonwealth Partners, VITA and the Commonwealth Agencies
- Manage project requirements, report status on projects
- Proactively identify and recommend solutions that bring value to VITA and the Commonwealth

Years of Experience in Position: 9

Resume:

Rox Ann is a PMI certified Project Management Professional, bringing over 20 years of experience working with or for government agencies. Rox Ann has the distinction of being a former state employee in the State of Missouri for 12 years prior to joining IBM. Since joining IBM in 1995, Rox Ann has held positions as a Business Analyst, an Application Development Manager managing teams of up to 50 people, including analysts, programmers, testers and technical support staff, and a Sr. Project Manager responsible for the full life cycle development and maintenance of large Social Service agency applications. Rox Ann has succeeded in developing strong customer relationships on all of her projects and as a result also improved customer satisfaction.

- **Pertinent Professional Experience:**

Sr. Project Manager/Business Area Manager

Rox Ann managed and provided direct supervision to a project team of 45 people, ensuring project deliverables for system enhancements, code maintenance and system operations were completed within scheduled time frames and planned budget. The enhancements were implemented in 74 counties in Wisconsin and supported over 1000 system users. The user community included State and local county staff. Rox Ann and her team worked closely with State and County employees to ensure both sets of user's requirements were met. Rox Ann was the primary customer interface, responsible for developing the customer relationship and responsible for managing day-to-day operations, reporting weekly status, conducting a weekly status meeting with key customer staff, and facilitating the delivery of quality deliverables on schedule.

Sr. Project Manager/Application Development

Rox Ann managed and provided direct supervision to application development, technical, warranty (maintenance) and test teams to design, develop and implement an integrated statewide child support system for the State of Missouri. The system was implemented statewide in 115 counties and 22 state

Rox Ann VanPool – Deputy Program Executive

field offices supporting over 2100 child support staff as system users, and in October 1998, received full federal certification by meeting the Family Support Act requirements. Rox Ann was instrumental in developing the partnership that joined the IBM and State teams and led them to the federal certification achievement.

As a result of the success in achieving federal system certification and the high level of customer satisfaction, the State of Missouri chose to amend their contract with IBM to fund the Personal Responsibility and Work Opportunity Reconciliation Act of 1996 (PRWORA) modifications to the system. Rox Ann remained in Missouri to lead this effort and PRWORA certification was achieved in February 2002. Rox Ann was the primary customer interface, responsible for maintaining the customer relationship and managing day-to-day operations, reporting weekly status, conducting a weekly status meeting with key customer staff, and facilitating the delivery of quality deliverables on schedule.

Rox Ann wrote and implemented version control and code release procedures for the technical operations team to facilitate the implementation of large system changes, meeting the PRWORA requirements, without interrupting day-to-day operations of the system and ongoing maintenance activities.

Sr. Project Manager/Turnover

As the Sr. Project Manager, leading a team for System Turnover, Rox Ann managed the system turnover of an established application to a customer team. The application included 380 on-line transactions, 90 batch programs, 135 reports and production of over 100 documents. The system was a 24x7 system with batch running every day of the year. Rox Ann wrote a Detailed System Turnover Plan which was approved by the customer and executed to successfully turnover the system to State IT staff. The turnover was executed over a six (6) month period and was successfully completed on schedule and on budget. There were no follow-on requirements to be met at the conclusion of the contract. At the conclusion of the contract, the following note of thanks was received from the two top state executives.

“We would like to thank you and your staff for the services you provided. It has been a pleasure working with your company. Thanks to you, Missouri has one of the best systems in the nation.”

Gary Bailey, Director of the Missouri Division of Child Support Enforcement; and Dennis Bax, the Director of Information Services and Technology Division Department of Social Services. October 9, 2001.

Missouri Department of Social Services

Rox Ann was employed by the Missouri Department of Social Services for 12 years. She held field office positions as a Family Services Caseworker and a Child Support Investigator. After two years as a Child Support Investigator and collecting over 179% of her annual collection goal, Rox Ann was promoted to a supervisor and managed a team of child support investigators. As a supervisor for the new Interstate Collections Unit, Rox Ann’s team collected 118% of their collection goal, and exceeded management expectations. Rox Ann also held positions as a Program Development Specialist writing program policy, procedure and systems manuals, and as a Management Analyst Specialist.

- **Education and Training:**

- Attended Oklahoma State University and University of Wisconsin-River Falls, studying Economics and Agricultural Economics

- **Certifications:**

Rox Ann VanPool – Deputy Program Executive

- PMI Certified Project Professional
- IBM Certified Senior Project Manager
- **Key Skill Sets:**
 - Project Management
 - Motivating Leader
 - State and Local Government
 - Systems Integration
 - Application Development
 - Customer Relationship
 - Communications
 - Risk, Issue and Change Management
 - Microsoft Project Planning
 - Creative Problem Solver

Prior Account 1: Missouri Department of Social Services, Division of Child Support Enforcement

Reference: Alyson Campbell, Missouri Division of Child Support Enforcement, Jefferson City, MO, (573) 522-2135

Prior Account 2: Wisconsin Department of Workforce Development, Bureau of Child Support

Reference: Susan Pfeiffer, IV-D Director, Bureau of Child Support Enforcement, 201 E. Washington Ave E200, Madison, WI 53703, (608) 267-4337, susan.pfeiffer@dwd.state.wi.us

Janice Brown –Woods – Program Office Manager

Account Team role: Program Office Manager



Our Program Office Manager was selected based on her experience in complex project management, her various project management roles on public and private sector accounts, and her record of accomplishments and customer satisfaction. As the Project Office Manager with IBM, she will own primary responsibility for the following tasks.

Major responsibilities:

- Managing the project schedule and planning components so that they are being tracked and maintained
- Providing project support services to the VTT Program project team
- Preparing monthly program status reports and scorecards
- Defining project management processes
- Focusing specifically on the following areas:
 - Scheduling, tracking and planning
 - Program Office Administration
 - Risk Management
 - Issue Management
 - Financial management

Years of Experience in Position: 17

Janice Brown-Woods has seventeen years of demonstrated skills in human resource management, systems life cycle development and project management with matrixed teams in multiple locations. She has a positive track record in building and maintaining strong customer relationships and a proven ability to manage large, complex projects under demanding conditions. As an IBM and PMI Certified Senior Project Manager, Janice has spent years managing projects deploying proven solutions to federal, state, and local government agencies across North America. She has a proven track record for delivering successful projects within scope, under budget and on schedule.

Resume:

- **Pertinent Professional Experience:**

PMO Project Manager – California Child Support Enforcement Project (CSE)

Janice is currently in a support role as a PMO Senior Project Manager for the California Statewide Child Support Enforcement Project. The CSE project is a consortium project with Accenture, American Management Systems, IBM as prime and other smaller subcontractors. In this support role, Janice works with the Project Office Staff on managing the project schedule and planning components, preparation of monthly program status reports, review of deliverable components with a focus on scheduling and planning, project office administration, risk and issue management, and financials.

Technical Services Personnel Manager – California Child Welfare Services/Case Management Systems (CWS/CMS)

As a Personnel Manager, Janice managed a matrixed team supporting the CWS/CMS Project in multiple locations. She was responsible for establishing, implementing, developing, and controlling

Janice Brown –Woods – Program Office Manager

best practices for the team. In this role, Janice also managed all aspects of salary administration, performance management, professional development, and staffing. She was also responsible for the development of the Project Management Office Process Document for CWS/CMS based on the World Wide Project Management Methodology. This document defined formal methodologies for standardization and defined key project performance metrics specific to CWS/CMS. In addition to these duties, Janice was also responsible for the management of the Project Office facility housing over 200 of the State and IBM resources supporting CWS.

Technical Project Manager – CWS/CMS Server Deployment and Consolidation Deployment

Janice served as the single point of contact for the state-wide deployment, conversion and consolidation of 297 Microsoft Windows 2000 file and print servers in over 250 county sites. She had overall responsibility for the delivery of state-wide technical services for file and print server configuration support for 297 servers, desktop management for over 20,000+ desktops, help desk support county and state-wide, and email management and server support for a server farm supporting 21 of the fifty-nine counties. The consolidation, successfully enable standardization of a supported operating system, promoting end user customer satisfaction for the State of California.

Project Manager – IRS Service Center Consolidation Project in Memphis, TN

As Project Manager on the IRS Service Center Consolidation Project, Janice managed a team of mainframe specialist responsible for delivering a fully operational test bed in support of the conversion from legacy systems. She was responsible for the overall planning, installing, configuring, evaluating, capturing, modifying, loading, manipulating, and testing of all hardware, software, firmware, telecommunications, and data required by the client's production environment.

Lead Project Manager – NetWorkStation Management Project in Memphis, TN

Janice was responsible for the management of IBM IT Specialists and local subcontractors on a project installing an integrated high speed, high bandwidth Local and Wide Area Network with Internet Access. This project involved the deployment of multi-vendor desktops to Administration Offices, classrooms and instructional labs at all 112 of the city schools. Janice partnered with local and minority/women owned firms to provide ordering, configuration, deployment, and installation services for the 3500 plus servers and workstations. This participation helped in overachieving the district's requirement for Minority and Women-Owned Business Enterprises (MWBE) participation on this awarded project.

- **Education and Training:**

- Bachelor of Science, Engineering Technology, University of Memphis, Memphis, Tennessee

- **Certifications:**

- PMI Certified Project Professional
- IBM Certified Senior Project Manager
- Multicultural Women Leadership Institute Graduate

- **Key Skill Sets:**

- Project Management
- Resource Management
- Process Management
- Client Relationship Management
- Communication Management
- Risk Mitigation and Issue Management



Janice Brown –Woods – Program Office Manager

- Financial Management
- Facility Management
- Microsoft Project Planning

Prior Account 1: State of California

Account 1 Reference: Ben Ampong, CWS/CMS Client Operations Support Manager
Contact: BAmpong@HHSDC.CA.GOV

Prior Account 2: IRS

Account 2 Reference: Nancy Hudson, IRS Contracts Officer, nancy.hudson@m1.irs.gov

Dana Dame – Real Estate Development Project Manager

Account Team role: Facilities Manager



Dana was selected as the Real Estate Development Project Manager because of his 19 years of multi Million-dollar development, project management and real estate experience. Dana has deep experience developing commercial real estate for a variety of uses including data centers.

Major responsibilities:

- Manage negotiation and execution of real estate agreements, construction and design contracts
- Manage the project design team and general contractor responsibilities
- Represent the facility owner in the project public approvals process
- Oversee the project schedule and project budget
- Coordinate move-in schedule from the facility perspective

Years of Experience in Position: 19

Resume:

- **Pertinent Professional Experience:**
 - Dana is a Development Project Manager, Senior Leasing Representative and directs all marketing and development activities related to a 2 million square foot office and industrial portfolio in the Virginia Region for Liberty Property Trust.
 - Dana joined Liberty Property Trust in 1995 and has been involved in the Virginia real estate markets since 1986 and has served as a Development Director, an Institutional Asset Manager and as an Investment Grade Income Property Broker. He has been responsible for the development and leasing of 1.8 million square feet during his career.
 - He holds a degree in English and a Masters of Business Administration from the University of Virginia. He is active in the National Association of Industrial and Office Properties (NAIOP), the Virginia Economic Development Association, and the Greater Richmond Association for Commercial Real Estate.
- **Education and Training:**
 - B.A. University of Virginia, 1979
 - M.B.A. University of Virginia, Colgate Darden School, 1986.
- **Key Skill Sets:**
 - Project Management
 - Financial Analysis
 - Real Estate Portfolio Management
 - Real Estate Development
 - Real Estate Acquisition

Prior Account 1: Capital One, 140 E. Shore Drive, Glen Allen, VA 23059

Reference: Mark Bell, Group Manager for CRE Analysis, Mark.bell@capitalone.com, (804) 290-6826

Prior Account 2: Suncom / Triton PCS, 1100 Cassatt Road, Berwyn, PA 19312

Reference: Bill Wukitch, Director of Real Estate, wswukitch@tritonpcs.com, (610) 648-8812

Robin Kehoe – Transition Manager

Account Team role: Transition Manager



Major responsibilities:

Our Transition Manager was selected for her full scope transition expertise and her broad industry experience.

Robin has responsibility for all transition activities including:

- Reporting to the Program Director and Project Executive
- Validating the objectives and completion criteria for the transition
- Communicating transition objectives and completion criteria
- Owning and managing the transition activities from startup to steady state;
- Managing the transition risks, scope, issues, status reports, deliverables, budget, schedule and quality

Years of Experience in Position: 15

Resume:

- **Pertinent Professional Experience:**

Robin has more than 15 years experience in project and personnel management in the information technology industry. She is currently acting in the role of Transition Integration Manager, and is an IBM and PMI Certified Project Manager.

Her expertise includes large International outsourcing contracts, proposals, project management, sub-contract management, system integration projects, and site wide project management of multiple projects. She has managed many large projects directly including complex systems implementations, industry application projects, and multiple integration projects.

As a Transition Integration Manager, Robin is responsible for full scope transition which includes issue management, problem management, project change control, communication process, dependency, status tracking, consolidation of all transition activities into one manageable project schedule, validating sub-project plans, schedules, and costs, and ensuring that all deliverables are identified. She has a broad industry experience, which includes utilities, insurance, government, retail, manufacturing, banking, and hospitals.

Transition/Transformation Development Manager

Robin is currently the Leader of a core team of multinational professionals that are responsible for developing and maintaining transition intellectual capital for worldwide transition managers. She has been responsible for the development of transition training modules used worldwide to train new transition managers. Robin also manages a bi-monthly newsletter that is distributed to over 1500 transition managers.

Transition/Transformation Project Manager

In her role as a Transition/Transformation Project Manager, Robin has managed the overall responsibilities of new development, maintenance, desktop support, help desk, telecommunications, mainframe services, Web services, distribution, and new offerings that the client needed to support their business.

- **Education and Training:**

Robin Kehoe – Transition Manager

- Masters of Project Management from Western Carolina University
- Bachelor of Business Administration from Mary Baldwin College in Staunton, VA
- **Certifications:**
 - PMI Project Management Professional
 - IBM Executive Certified Project Manager
- **Key Skill Sets:**
 - e-Relationships
 - Strategy and Planning
 - Management Systems/Culture
 - Organizational, Management Systems
 - Initiate Projects, Plan Projects, Project Track / Report / Deliver, Manage Project Risk, Select Project Management Processes / Tools, Quality / Problem Prevention, Methodologies, Leadership
 - Communication
 - Negotiation
 - Problem Solving/Decision Making

Prior Account 1: IBM Dow Chemical Project Executive

Reference: Linda Feigel/Wilmington/IBM, 303-469-2469

Prior Account 2: IBM Equifax

Reference: John Henriksen/Alpharetta/IBM

Ken Bean – Messaging Transition Manager

Account Team role: Service Delivery Manager – Messaging Transition



Ken was selected to serve as Transition Lead for Messaging because of his 18 years experience specializing in Infrastructure Migrations, predominately around messaging systems. Ken will be able to leverage his background and experience as an IT Manager for the Federal Government, Commercial Consulting Manager and Government Consulting Manager to provide best-practices for VITA.

Major responsibilities:

- Manage Messaging Tower from a Migrations perspective
- Work closely with Messaging Operations Lead on migration from legacy environment to steady-state mode of operations into the new solution environment
- Perform consolidation and centralization into high availability Microsoft Exchange environment
- Recommend services and standards for supporting the VITA Messaging Services business requirements and platform standards
- Work with appropriate IT service delivery personnel to perform the installation, testing, and tuning of all technical environment hardware, software, peripherals and interfaces related to supporting messaging platforms
- Provide problem determination and resolution associated with pre and post migration tasks
- Define and report on test-to-production tasks and results
- Identify possible Service enhancement opportunities for improved performance and potential cost savings

Years of Experience in Position: 18

Resume:

Mr. Bean is a management professional combining a degree in Computer Science with over 18 years experience leading the analysis, planning, implementation and support of Microsoft-centric, enterprise level systems. He maintains a proven track record for delivering projects on-time, on-budget and with high customer satisfaction and predictable outcomes. Mr. Bean is a former federal employee; who evaluated, tested and implemented technology for the U.S. Senate. He completed the transition to the private sector to develop and deploy solutions for large commercial and federal clients. Mr. Bean provided program management, oversight and support primarily to the federal government by delivering industry best practices, process and solutions to meet organizational requirements.

- **Pertinent Professional Experience**

Internosis, Incorporated, Arlington, VA Managing Principal, Mid-Atlantic Region

- Responsible for the operational delivery, customer satisfaction, account profitability and revenue growth for leading commercial and government accounts in the Mid-Atlantic district
- Program Manager for key accounts, maintaining customer relationships and leading customer retention and expansion, through the assurance of optimal delivery of service and customer satisfaction
- Develop and deliver the process and solutions for planning and implementing Microsoft-

Ken Bean – Messaging Transition Manager

centric enterprise level systems to meet organizational requirements

- Manage personnel through effective communications. Conduct interviews for new employees and provide regular performance reviews, coaching, mentoring and leadership towards objectives

- **Corporate Software & Technology, Arlington, VA
Practice Manager, Mid-Atlantic Region**

- Supervised 6 project managers and approximately 50 consulting engineers in the sales and delivery of Microsoft-centric infrastructure consulting services. Provided project based planning, design, migrations and deployments from legacy systems to the latest Microsoft technologies
- Attended meetings with clients, identifying business and technical requirements, aligning requirements with capabilities, representing service offerings, developing solutions and proposals and presenting results
- Developed consulting service offerings including Microsoft Windows 2000, Active Directory and Exchange 2000 solutions. Provided management support and direction to prepare and deliver these new offerings. Monitored the progress of projects, provided quality assurance reviews and incorporated findings back into the process.

- **United States Senate, Washington, D.C.
Supervisor of Technology Review, U.S. Senate Computer Center**

- Supervised staff conducting the evaluation and introduction of new office automation systems and services for 10,000 Senate users nationwide. Technologies included new microcomputer hardware, software, network-operating systems, Internet services and communications infrastructure
- Managed budget allocation and lab resources that simulated the Senate environment for testing which included Microsoft, Novell and Macintosh desktops and LAN systems connected to mainframes, minicomputers, a wide-area network and an FDDI ring
- Provided written recommendations, technology forecasts, briefings and policy guidance to senior management, policy and decision makers.

- **EDUCATION**

- Bachelors of Science, Computer Science, 1987
George Mason University, Fairfax, VA

- **PROFESSIONAL RECOGNITION**

- OMEGA North Face Award for Customer Satisfaction
Microsoft Partner of the Year, Mid-Atlantic Region
Microsoft Partner Advisory Council for Infrastructure, Member
Chairman's Club – Internosis, Inc.
Circle of Excellence – Internosis, Inc.

- **Major Projects:**

- **U.S. Geological Survey (USGS)** – Providing program and project management, planning and design for enterprise-wide directory services, including Microsoft Windows 2003 Active Directory and meta-directory services, to meet OMB requirements and support e-government initiatives (2003-Present)
- **U.S. Department of Labor (DOL)** – Providing program and project management, planning and design for enterprise-wide directory services, including Microsoft Windows

Ken Bean – Messaging Transition Manager

- 2003 Active Directory and Exchange 2003, to meet OMB requirements and support e-government initiatives (2002-Present)
- **U.S. Department of Agriculture (USDA)** – Providing infrastructure upgrade services including Microsoft Windows 2000 Active Directory, Exchange, Windows XP and firewalls for multiple agencies within USDA (2002-Present)
 - **Housing and Urban Development (HUD)** – Conducted an independent verification and validation (IV&V) of the Microsoft Windows 2000 Active Directory design and supported the implementation nation-wide. Developed the standard Windows XP desktop image, application compatibility testing process and deployment methodology and providing escalated support during the full implementation (2002-2003)
 - **American Association of Retired Persons (AARP)** – Completed an enterprise-wide transformation and server consolidation from legacy platforms including Novell servers to Microsoft Windows 2000 Active Directory, Exchange 2000 and Windows XP on the desktop (2002-2003)
 - **National Academies of Science (NAS)** – Managed the design and implementation of Microsoft Windows 2000 Active Directory and messaging migration from Lotus Notes to Exchange 2000 through Pilot (2002-2003)
 - **Sun Oil Company (Sunoco)** – Managed the complete migration of approximately 6,000 users from five different messaging platforms (predominately Lotus cc:Mail) located in 40 locations across the U.S. to a hosted Microsoft Exchange 2000 solution provided by USinternworking (2002)
 - **The Bank of New York (BNY)** – Provided the analysis, planning and deployment Microsoft Systems Management Server (SMS) within the context of Microsoft's Operations Framework (MOF) for desktop management, hardware/software inventory and software distribution of 12,000 users nationwide (2001)
 - **Baltimore Gas & Electric (BG&E)** – Managed the complete messaging migration of approximately 6,000 users from Lotus cc:Mail to Microsoft Exchange including delivery of training, escalated support and knowledge transfer to the organization (1999-2000)
 - **International Monetary Fund (IMF)** – Managed the complete migration of approximately 6,000 users from Novell GroupWise to Microsoft Exchange including deploying Outlook to all the clients and providing escalated support, training and knowledge transfer to the organization (1999)
 - **Executive Office of the President (EOP)** – Designed and implemented Microsoft Systems Management Server (SMS) enterprise-wide for hardware/software inventory, software distribution, remote control and application monitoring (1998)

Prior Account 1: Dept of Interior, U.S. Geological Survey (USGS)

Mr. Paul Exter, peexter@usgs.gov, (410) 238 – 4234

Prior Account 2: USDA

Mr. Charles Barclay, charles.barclay@usda.gov, 202-720-1100

Tom Mennine – Network (Data, Voice & Video) Transition Manager

Account Team role: Service Delivery Manager – Network Transition



Tom Mennine was chosen to be the Manager for the Data and Voice & Video Network Transition Project. Tom has extensive experience in engineering and enterprise infrastructure technology solutions for numerous clients including State Government. His focus over the past sixteen years has been strategic planning, design, implementation, operations and support of enterprise applications, systems and networks. Additionally, Tom has program management experience with large-scale, multi-site infrastructure implementations (applications, infrastructures and procedures), and has an extensive operational experience with maintaining enterprise-based systems.

Major responsibilities:

- Manage the Network Infrastructure Team responsible for providing transition assistance to the Commonwealth of Virginia
- Manage the development of a transition strategy that included all digital transport, voice, data, video and Internet access services
- Assist in the development of the transition support services approach that will provided commonwealth users a system for access to all provisioning, billing, network management, inventory and trouble ticket information required to support the enterprise network transition
- Assist in the identification and documentation of client transition requirements and objectives
- Provide technical leadership in the development of service-related requirements and overall enterprise networking strategy
- Recommend WAN, LAN, RAS, Network Security Services, standards and requirements based on industry best practices
- Develop and document Network provisioning, engineering, design, requirements and policies, in accordance with Procedures Manual
- Recommend Network capacity thresholds
- Provide capacity and performance reports on a monthly basis or as needed while also reporting monthly (or as needed by VITA) team's performance against Service Level
- Coordinate Service delivery with Help Desks, as well as other support groups within each of the other Towers in coordination with Eligible Customers, VITA, and all appropriate third parties, as necessary
- Provide Voice and Video Telecom Services design and engineering to meet Commonwealth strategies and requirements
- Provide administrative support for specialized services (e.g., fax broadcasting, foreign language translation) as outlined in existing contracts with third parties
- Acquire, install, operate, manage and maintain all Voice and Video Telecom Services for all Eligible Customers
- Provide fraud prevention, detection and reporting
- Coordinate Service delivery with Help Desks, as well as other support groups within each of the other Towers in coordination with Eligible Customers
- Manage and maintain the equipment and circuits for all Commonwealth facilities

Years of Experience in Position: 29+

Tom is a Senior Manager in BearingPoint's Infrastructure Solutions practice. His experiences cross several industries and government organizations including health care, financial, manufacturing, information services, universities and state and local government.

Tom Mennine – Network (Data, Voice & Video) Transition Manager

Resume:

- **Pertinent Professional Experience:**

- Lead the Infrastructure Team that developed and implemented the server consolidation and disaster recovery approach for Towers Perrin supporting three major applications being run in their New York Data Center
- Led an infrastructure team to develop a state-of-the-art telecommunications network infrastructure capable of supporting increasing bandwidth requirements and emerging technologies for the Commonwealth of Pennsylvania
- Developed a voice strategy for the Government of Ontario, which included evaluating Voice over IP (Bell Canada – Hosted IP and enterprise), Telecommunications Management systems (including automated bill validation) and Return on Investment (ROI) for each of the identified options
- Developed a voice services strategy for the CIO of a Top 5 US retail bank, including the deployment of IP Telephony technology in 700 branches. The project leveraged a Design For Six Sigma methodology
- Managed the infrastructure team responsible for providing transition assistance to a Mid-Atlantic state for the transition to a new telecommunication service provider. The transition included all voice, data and video services and selected IT infrastructure throughout the state
- Created and documented a comprehensive set of network management processes and procedures. Scope of work included the development of detailed policies and procedures for the day-to-day operations of the network, as well as process to identify track and resolve network problems. Also addressed in this engagement were the Help Desk requirements and a comprehensive set of recommendations for proactive network management
- Developed the technical architecture for a statewide Intranet specifically for the administration of criminal justice. This architecture links information from diverse hardware/software platforms using common web-browser interfaces. The architecture uses firewalls; secure communications protocols, data encryption, and authentication based on digital signatures and certificates to protect the information from unauthorized users
- Designed the communication infrastructure for a major metropolitan health care provider for the reorganization of systems, applications and staffing to reduce cost. The network included 11 acute care hospitals, 10 diagnostic and treatment centers, 7 rehabilitation centers and 50 clinics. The design assessed the current infrastructure and defined the future network and application requirements of the client
- Developed technical requirements for a statewide law enforcement agency's Enterprise Network. Requirements included all aspects including WAN, LAN, backbone, server, remote access, addressing, workstations, desktop applications and management support systems
- As project manager for a major Data Center re-location project, Tom assisted with the migration of Intel and IBM Mainframe-based systems and applications as part of a consolidation effort. Responsibilities included developing the move methodology, project contingency plans, disaster recovery plans, managing the server discovery and server move phases

Tom Mennine – Network (Data, Voice & Video) Transition Manager

- Developed a global network strategy for a Fortune 500 manufacturer. This work included an overall assessment of networking requirements for voice, data, and video applications across the globe. Ultimately, a 5-year network strategy and migration plan was prepared and accepted by the client.
- Managed an IT assessment of an ORACLE installation for a major International Food Service vendor. The architecture and project management focused on Enterprise server selection and installation, LAN and WAN design, corporate e-mail consolidation, service center, IT reorganization, and disaster recovery project plan.
- **Education and Training:**
 - A.S. in Business Automation Management from Pierce College in 1974
 - Professional Development
 - Data Communications
 - Network Design and Management
 - Project Management
- **Key Skill Sets:**
 - Program and Project management
 - Technical team-based development
 - Network Integration Methodologies
 - Client/server development and deployment

Prior Account 1: Commonwealth of Pennsylvania

Reference: Mr. Charles Strubel, 1 Technology Park Harrisburg PA, cstrubel@state.pa.us, 717-772-8009

Prior Account 2: State of Ohio

Reference: Mr. Tony Yankus, 1320 Arthur E. Adams Drive Columbus OH, tony.yankus@ohio.gov, 614-466-5300

Todd Ramsey – General Manager Global Government Industry

Account Team role: Business Development and Innovation Executive



Todd Ramsey was selected as our Business Development and Cooperative Value and Innovation manager because of his immense success helping governments and public-sector customers leverage information technology to promote economic development, increase revenues, enhance services and improve the efficiency and effectiveness of operations.

Major responsibilities:

- Lead the Commonwealth Partners in reviewing market opportunities and performance
- Recommend opportunities for growth, assessing market risk and developing pricing for those opportunities
- Coordinate efforts with VITA Business Development Managers, Eligible Customer relationship management and Performance Managers
- Develop strategies to increase value
- Act as the Business Change Architect
- Identify opportunities for strategic change based upon an understanding of the Commonwealth's business model
- Build a collaborative team with the Commonwealth to identify mutual business enhancement opportunities

Years of Experience in Position: 25+

Resume:

- **Pertinent Professional Experience:**

Todd S. Ramsey is general manager for IBM's Global Government Industry. He is responsible for all IBM business with governments around the world. In this role he sets the overall strategy, develops specific government solutions and marketing programs, and directs the deployment of consultants, government specialists and client-relationship teams worldwide.

Mr. Ramsey recently authored a book entitled *On Demand Government, Continuing the e-government Journey*, which provides a new guide for government leaders who want to act decisively to integrate government operations and use government transformation as a catalyst to address challenges to their society.

Mr. Ramsey joined IBM in 1972 in Endicott, New York, as a hardware systems designer. He later worked as an engineer for both the U.S. Air Force and IBM, specializing in communications systems and NASA space projects. In 1979 he joined the IBM marketing and sales organization and has held a number of management positions, including branch manager in Norfolk, Virginia, executive assistant to the president of the National Marketing Division and regional manager of the National Federal Marketing organization. In 1991, Mr. Ramsey was named vice president and general manager for the IBM Federal Systems Company, responsible for business relationships and the integration projects for the U.S. Government. Most recently, he was the vice president and general manager of Government Industry for Asia Pacific and lived two years with his family in Singapore. Mr. Ramsey is a member of IBM's Worldwide Public Sector Management Board.

- **Education and Training:**



Todd Ramsey – General Manager Global Government Industry

- B.S., Electrical Engineering, University of Akron
- M.S., Business Administration, Auburn University

Dr. Anand J. Paul – Global Research Executive

Account Team role: Business Development and Cooperative Value and Innovation



Dr. Paul was selected for our Business Development and Cooperative Value and Innovation team because of his in developing joint strategies between IBM Research worldwide and the Public Sector.

Major responsibilities:

- Lead the Commonwealth Partners in reviewing market opportunities and performance
- Recommend opportunities for growth, assessing market risk and developing pricing for those opportunities
- Coordinate efforts with VITA Business Development Managers, Eligible Customer relationship management and Performance Managers
- Develop strategies to increase value
- Act as the Business Change Architect
- Identify opportunities for strategic change based upon an understanding of the Commonwealth's business model
- Build a collaborative team with the Commonwealth to identify mutual business enhancement opportunities.

Years of Experience in Position: 25+

Resume:

- **Pertinent Professional Experience:**

Dr. Paul is the Global Research Executive for the Public Sector in IBM's Research Division. In this role, he helps develop joint strategies, provides linkages between IBM Research worldwide and the Public Sector, sponsors and co-leads the Industry Innovation Council, helps develop (First-Of-A-Kind) FOAK proposals and provides industry-specific presentation materials. In addition, he participates in the planning and execution of key customer events at the Industry Solutions Laboratories, customer conferences, and one-to-one customer meetings, and helps formulate Research value-add propositions for large contracts.

Dr. Paul has a broad range of experience in government operations and consulting. He has worked on projects for Federal agencies including the U.S. Departments of Defense – Army, Navy, Air Force and Defense Logistics Agency; U.S. Departments of Education, Veterans Affairs and Health and Human Services. In the commercial sector he has advised non-profit professional associations, multi-national manufacturing organizations, and high-technology companies. He has more than 20 years experience as a Project Manager and Analyst in electronic commerce, change management, business process redesign, organizational analysis, personnel management, customer satisfaction, benchmarking, instructional design and training, mathematical modeling and simulation, and process improvement.

Dr. Paul has been a speaker on manufacturing and electronic commerce change management across the U.S. He also served as an adjunct faculty member at West Virginia University. He has authored 55 technical papers, edited three books, organized three international conferences and chaired numerous

Dr. Anand J. Paul – Global Research Executive

sessions in various national and international conferences.

- **Education and Training:**

- P.A. and M.B.A., University of Pittsburgh, PA
- PhD, Materials Science and Engineering, Pennsylvania State University

Dr. Howard E. Sachar – IBM Director

Account Team role: Business Development and Cooperative Value and Innovation



Dr. Sachar is the IBM Director for Strategic Outsourcing Innovation in the Americas, responsible for infusing innovation into IBM's outsourcing relationships.

Major responsibilities:

- Lead the Commonwealth Partners in reviewing market opportunities and performance
- Recommend opportunities for growth, assessing market risk and developing pricing for those opportunities
- Coordinate efforts with VITA Business Development Managers, Eligible Customer relationship management and Performance Managers
- Develop strategies to increase value
- Act as the Business Change Architect
- Identify opportunities for strategic change based upon an understanding of the Commonwealth's business model
- Build a collaborative team with the Commonwealth to identify mutual business enhancement opportunities.
-

Years of Experience in Position: 20+

Resume:

- **Pertinent Professional Experience:**

Dr. Sachar recently was the Director and co-leader of the JP Morgan Chase Value Creation Center (VCC). The VCC was given a mission to enable JPMC to gain the greatest possible business value from the innovative use of technology. In this role Dr. Sachar was directly accountable to the JPMC CIO and the Technology Council.

Dr. Sachar joined IBM in 1974 and has held a variety of technical positions in hardware, software, and systems research and development. In 1994 he assumed management of the IBM Research group responsible for hardware and software imaging technologies. In this position, Dr. Sachar developed state-of-the-art imaging technologies for cultural institutions and commercial applications. During this time he initiated and directed customer engagements, integrating emerging technologies with business processes. In 1999 Dr. Sachar became the manager of IBM's Insurance Research Center where he established IBM's technical thought leadership and demonstrated the impact of emerging technology on the insurance industry. In 2001 Dr. Sachar joined IBM Global Services to build IBM's extended value proposition as part of our Outsourcing (SO) relationships, enable a select set of customers to leverage the breadth of IBM's technical capabilities.

- **Education and Training:**

- Ph.D., Mathematics, Lehigh University



5.3.7 Account Team Position Descriptions Response

Functional Role	Responsibilities
Program Office Manager	The Business Office Manager focuses specifically on coordinating the management of contract change request activities, scheduling and planning, Program Office Administration, risk management, issue management and financial management.
Facility Manager	The Facility Manager is responsible for the management and maintenance of the physical plant sites included in the delivery of Services. He develops space and workplace strategies to optimize employee efficiency and productivity. This includes facilities management, facilities engineering, equipment maintenance and operations, energy management, workplace design, construction, contract management, housekeeping, cafeteria services, real estate expense management and administrative services.
Deputy Program Executive	The Deputy Program Executive is responsible for the day-to-day management and operational coordination of Commonwealth Partner services across service towers and new service requests. She works closely with the Commonwealth Partners and Commonwealth Management team to manage project requirements, produce quality deliverables and meet service levels. The Deputy Program Executive proactively identifies and recommends solutions that bring value to VITA and the Commonwealth.
Transition Manager	The Transition Manager is responsible for managing tasks to transition the Services for each Tower to the Commonwealth Partners. The Transition Manager is experienced in performing complex transitions and has a proven ability to smoothly transition clients from their existing environment to a managed services environment. Development and management of plans focused on minimizing interruption to the end-user community. Experience using Enterprise Operations Processes (EOP) is important.
Agency Services Managers	<p>Agency Services Managers (ASM) are aligned with VITA’s Enterprise Service Directors and are responsible for day-to-day management and operational coordination of Commonwealth Partner services and new service requests across services towers. Agency Services Managers are managed by the Deputy Project Executive and are aligned the Agencies and Secretariats they service.</p> <p>The Agency Services Managers are responsible for customer satisfaction and the achievement and subsequent reporting for committed Service Levels for their respective customers and addressing any operational issues that may arise. The ASM will escalate any open problems and follow them through to resolution and will oversee corrective actions to completion.</p>
Business Development Manager	The Business Development Manager leads the Commonwealth Partners in reviewing market opportunities and performance, making recommendations for growth, assessing market risk, and developing pricing for growth opportunities. Coordinates efforts with VITA



Functional Role	Responsibilities
	Business Development Managers, Eligible Customer relationship management, and Performance Managers for each Tower.
Cooperative Value and Innovation Manager	The Cooperative Value and Innovation Manager develops strategies to increase the value associated with the Services. Acts as “Business Change Architect”. Based on an understanding of dynamic changes in the Commonwealth’s business model, identifies opportunities for strategic change to maintain relevancy. Capable of articulating the “as is state”; “to be state”; the route map to get there and impact on the business model. He builds a collaborative work team with the Commonwealth to identify mutual business enhancement opportunities.
Transition Technical Tower Service Delivery Managers	Transition Technical Tower Service Delivery Managers are responsible for the transition and support of technical services according to the Transition Schedule.
Technical Support Systems Analysts	The Technical Support Systems Analysts are responsible for delivering the day-to-day services for their assigned tower(s). They strive to meet Service Levels, respond to trouble tickets, and complete Root Cause Analysis on problems.
Performance and Availability Manager	The Performance and Availability Manager will deliver and manage the integration of processes, procedures, technologies, and data required to package monthly reports on contractual SLA measurements. The Performance and Availability Manager will monitor availability, monitor trouble ticket queues, assign resources, monitor service delivery, and monitor overall daily operational performance. They will manage the Problem and Change processes and are responsible for audit readiness. They will escalate any open problems and follow them through to resolution and will oversee corrective actions to completion. This team will provide a standard monthly SLA measurements package. Performance Managers provide input to VITA architecture and strategy process, and continually seek opportunities for technology and process innovation. Performance and Availability Managers are experienced practitioners in the use of Enterprise Operations Problem and Change Management Processes.
Data Center Operations Manager	The Operations Manager is responsible for day-to-day management of the Data Center command center and console operations. Services managed include server monitoring, fault detection, fault logging, Level 2 notification, fault diagnosis, fault correction, production job submission and monitoring and communications to VITA and the Commonwealth business application teams and management on fault correction status. Tivoli, Problem and Change management and system software experience in a high availability production server environment are essential.
Disaster Recovery Planning Manager	The Service Continuity and Disaster Recovery Coordinator develops a services recovery program that documents the strategies, plans, personnel, and resources that will be used to respond to short- or long-term business interruption affecting the Infrastructure environment

5.4 Professional Development

5.4.1 Training policies and procedures

Training and development form an integral part of our strategy to maintain highly-skilled employees working in an empowered and adaptive environment. Continuous professional development ensures that our employees are up-to-date on the latest technologies. Personal development training is also provided on topics that contribute to efficiency and improved productivity. Employee education assists employees in broadening their capabilities, sharpening their skills, and enhancing their careers. This on-going investment is vital to the achievement of mutually agreed-to goals and to ensuring a positive employee relations environment.

VITA employees joining IBM and other members of the Commonwealth Partners team will be provided access to the industry leading training and professional development programs provided to these organization's employees, representing new and expanded training opportunities and benefits.

To prepare our employees to further enhance our leadership role in the IT services industry, IBM implemented a skills-based, worldwide Professions program that ties employee skills development and career growth to client requirements and strategic business needs.

To keep employees' skills current, IBM Global Services uses a skills management process shown in Figure 5 – 3 as follows:

- **Planning:** Overall assessment of business and technical needs and identification of core competencies, definition of skills and skill requirements
- **Assessment:** Evaluation of the opportunities and investment needs to provide input on the skills profile, inventory, and gap analysis
- **Goal Setting:** Resolution of any skills gap, development of an employee's education plan, and implementation of an employee's education roadmap
- **Development and Deployment Plans:** Implementation of skills rebuilding, validation of skills, and assignment to key projects that utilize the skills

IBM Skills Management Process

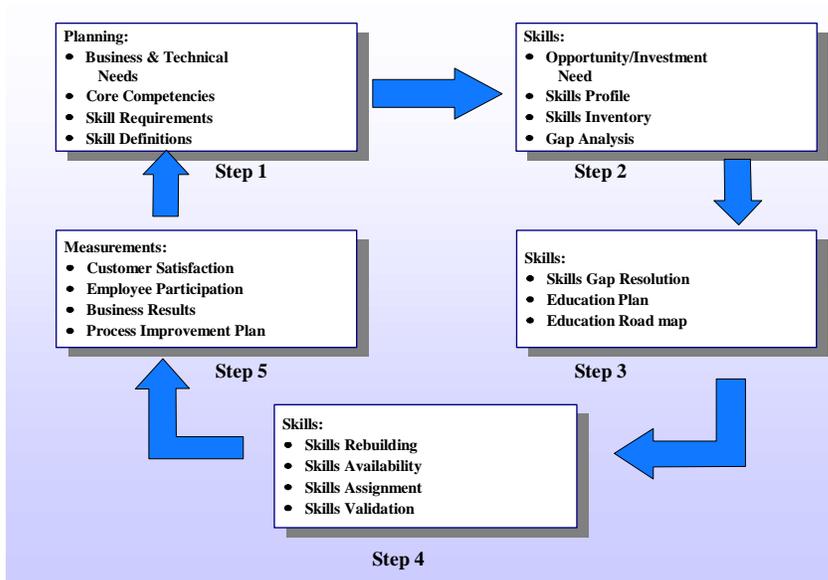


Figure 5 – 3. Skills Management Process allows the full cycle of learning and applying learning

For example, IBM’s employee development process begins with an Individual Development Plan (IDP), a formal action plan for employees. The IDP is an action plan designed to be a clear framework to identify strengths, interests, goals, expertise needs, and development activities. The employees transferring from the Commonwealth to IBM, as well as the IBM heritage employees working on the Commonwealth account, will all have business commitments directly related to the service to be provided to the Commonwealth. The employees’ responsibilities will also be reflected in their IDP in order to grow their experience and their career opportunities on the Commonwealth account. Other members of the Commonwealth Partners team employ similar employee development processes.

5.4.2 Professional certification standards

IBM began certifying the knowledge and skills of our most experienced project managers in 1992. The certification process validates that IBM’s project managers have developed specific project management skills and knowledge. One of the requirements for certification is passing the Project Management Institute’s Project Management Professional (PMP) exam. This exam verifies that IBM project management profession members have a common foundation of fundamental, globally recognized project management knowledge. Project managers who have achieved certification have had to demonstrate a high level of competence, based on a combination of knowledge and practical experience. IBM certified professionals are required to periodically re-certify, verifying that the project management professionals have ongoing opportunities to update their skills, education, and experiences.

Similarly, skills development of IT Architect and IT Specialist professionals is managed through a certification process. The progression from level to level of the IT architect profession is validated at three checkpoints:

- Accreditation validates that the new IT architect has built up the appropriate level of the fundamental skills of the profession and helps define the path for further growth in a IT architect discipline
- Certification validates that the IT architect has built experience and deep skills in the chosen discipline. In a sense, it provides a quality assurance status in the individual's ability to create architecture solutions without assistance
- Senior certification validates that the senior IT architect has achieved set business and technical leadership capabilities that mark the individual as a technical leader in the community

5.4.3 Succession planning methodology



IBM has received the #1 ranking in Training Magazine's "Training Top 100" for its outstanding learning programs. Training's executive editor said the publication's fourth annual survey ranks those companies that "understand, embrace and use training to achieve real business results, support corporate values and enhance the work lives of employees." IBM has placed in the top five every year since the inception of the Training Top 100 in 2001 -- and received the highest honor this year out of a field of over 500 submissions.

Training magazine is a professional development magazine that advocates training and workforce development as a business tool and deals with issues such as leadership and succession planning, recruitment and retention, learning theory and on-the-job skills assessments. Training magazine is read by more than 150,000 people each month.

IBM's 2004 Training Top 100 no. 1 ranking adds to several other training and development honors received by IBM including ASTD "Excellence in Practice" awards, Online Learning Excellence Awards, International Society for Performance Improvement Excellence in Practice Award, Axiem Awards, Corporate University XChange Awards, Singapore's People Developers Standards Award, Germany's Deutscher Industrie-und Handelstag and Canada's OSTD Ontario's Top Training Excellence Recognition.

IBM has a number of tools and methods available to assist managers in filling forecasted position openings. These will provide the capability to identify and develop skilled employees to satisfy future Commonwealth of Virginia staffing needs.

5.4.3.1 Managers and Developing Leaders

IBM maintains a pipeline of qualified Project Executive candidates. This database is used by IBM management teams to manage, educate and communicate to the project management community, make informed strategic business decisions and for deployment of qualified candidates to customer opportunities. Candidates are identified, based on experience and skills, for matching assignments. Training is developed and targeted based on the needs of the population and strategic business needs.

IBM has a rich history of developing strong leaders through our programs in Executive and Management Development.

LEADing@IBM is IBM's enterprise-wide learning continuum for developing leaders -- from emerging leaders through the most senior executive level. LEADing@IBM shown in Figure 5 – 4 includes multiple programs to address the needs of future, current and experienced managers and executives at different points in their careers. It combines e-learning and Work Enabled Learning along with ongoing coaching and support from the participant's manager to give employees the highest quality learning experience relevant to his or her work environment.

This is an integrated approach to developing leaders at IBM. We are segmenting our leaders into four main groups and each will learn the next level of leadership, while building off previous development and experience. IBM's values and competency models serve as the foundation for the entire LEADing@IBM continuum. By grounding our learning in the values and competencies, we have a direct link to transforming our culture and delivering on our on demand strategy.



Figure 5 – 4. LEADing@IBM is an important component of our succession planning for managers and for developing leaders

Affected employees joining IBM as managers through the VITA Infrastructure initiative will attend Basic Blue for New Leaders. The focus of Basic Blue for New Leaders is advanced leadership education and learning from the activities performed in the management role.

5.4.3.2 All Employees

To ensure development efforts are centered on the right areas, IBM maintains an ever-evolving list of the skills that are in demand in the marketplace. By understanding what skills are most in demand today and in the future, we can proactively retrain and redeploy employees to new assignments before their skills become outdated.

All employees have access to the Personal Development (PD) tool. Expertise profiles and skills information entered in the tool automatically populates Opportunity Marketplace, a PeopleSoft based job-matching solution. When managers forecast a staffing opportunity or when employees are ready to pursue a new job, employees update availability dates and their accomplishments to fully capture their previous work experience.

Through Opportunity Marketplace, IBM gains insight into the talent and skills available internally to meet the needs of our clients. Managers have a more complete view of their teams as use the profile information to foster career growth and skills development with employees.

5.5 Annual turnover rates

At IBM, we pay for performance, we pay competitively, and we differentiate strongly. IBM's cash compensation includes base pay, a performance bonus program (profit sharing) based on both individual and IBM performance, and an awards program. IBM's total compensation program is designed to attract and retain top contributors in the IT industry. To ensure the attainment of this objective, IBM uses very broad salary structures and participates in several national compensation surveys annually. This broad range of earnings opportunities contributes to IBM having one of the lowest attrition rates in the industry.

The Commonwealth Partners will employ the following strategies to minimize the amount of staff turnover:

- *Establish the Commonwealth Infrastructure Services roles as attractive regional positions* – Given the strategic importance and the visibility of the Infrastructure initiative across the Commonwealth, the Commonwealth Partners consider the Infrastructure team roles to be among the most significant professional and technical positions in the region and the Industry. The positions will offer our employees a unique opportunity to work in a dynamic environment with leading-edge software and hardware technologies.

Our management team will combine a number of human resources strategies to ensure that these positions remain attractive to our initial team members, and that they encourage growth and promotional opportunity within the team, and for prospective new team members. These strategies include unique compensation and incentive programs for achieving business unit goals, and formal professional development activity to provide opportunities for enhancing skills through education, increased responsibility and varied assignments within the team.

Our confidence in our ability to minimize team turnover is bolstered by our excellent track record in recruiting and retaining professional employees. Our attrition rate is traditionally less than one-half the industry average. This translates into higher availability and less risk for the Commonwealth.

- *Involve the Commonwealth in the staffing process* – In cases where a Key Account Team Manager leaves the team as part of a planned transition, the Commonwealth Partners will work closely with the Commonwealth to provide a smooth transition and to minimize personnel disruption. We will provide the Commonwealth with reasonable advance notice and will consult with the Commonwealth on potential replacement candidates from our vast network of services professionals.
- *Leverage IBM's recruiting resources* – IBM maintains a continuous pipeline of technical professionals through a number of recruiting resources including 36 dedicated technical recruiters, 200 external search firms, extensive internet-based recruiting programs, participation in major web-based employment boards, and our employee referral bonus program. In addition, our network of local and national business partners and subcontractors augment our short-term recruiting. Our local management team will leverage these resources as required to maintain availability of new team members.

The milestones reached as an employee advances from one level to the next may describe a client service career at BearingPoint. These milestones occur at hiring and through promotions. For staff-level professionals, the emphasis is on skills-based learning. For management group members, the emphasis shifts to solution expertise, leadership skills, and product knowledge training. Ultimately, employees can expect to have a well-rounded combination of engagement experience and learning and development opportunities to help build a successful career.

At BearingPoint, employees have access to a wide variety of learning and development resources and tools. These resources and tools increase each employee's knowledge, skill sets and proficiencies. In addition, an extensive learning and development catalog is available which offers a wide variety of personal and professional subject areas. All employees are required to fulfill a minimum of 40 hours of training every year from a wide variety of online and classroom based training covering numerous of technical and functional areas. The completion of this requirement is factored into every employee's mid-year and annual performance evaluations.

BearingPoint has constructed training courses that will develop employees' career development cycles. We view this career development cycle as having three phases:

1) Learn Our Business, 2) Run Our Business, and 3) Lead Our Business. In Phase one, new employees will learn our business and begin building a foundation for their BearingPoint career. Typically in this phase the employee will focus on completing those courses that introduce him/her to our BearingPoint culture, methods, tools, and techniques. In phase two, the focus shifts to learning to run our business and continuing to build business and technical skills. By the time this phase is reached, the employee will have spent several years developing consulting expertise and transitioned to client delivery work on specific business and technical disciplines. Much of the learning and development activity in this phase will focus on business and technical courses. Phase three of a BearingPoint employee's career will see involvement into a leadership role. This is the phase in which employees move to leading our business and leveraging their experience. The learning and development focus in this career phase will be on the development of business management and leadership skills.

Training at BearingPoint does not merely focus on new hires, but creates an atmosphere of continued education at all levels of employment. We offer ongoing learning and development programs to help keep team members at the leading edge of their disciplines. In addition to knowledge, technical and leadership courses, BearingPoint offers employees many different alternatives, including: courses outside of BearingPoint, attending related business conferences, developing new courses, teaching or facilitating training courses and attending college classes. BearingPoint believes that developing our team members is critical to our success, so we invest both dollars and time to create a thorough, comprehensive, and continuous learning and development process. These resources give employees the opportunity to continuously improve their skills and abilities.

5.6 Relationship Management Requirements Acceptance and Exceptions

Instructions to Vendors: Unless specifically noted in the appropriate tables below, Vendor agrees to perform the services and associated roles and responsibilities (as outlined within Schedule 6.3, Section 3 Relationship Management Requirements). Section 3 is not considered to be all-inclusive. Vendor shall clearly indicate in the tables below if it does not accept the requirements defined in Schedule 6.3. Commonwealth considers the Vendor to agree to all Schedule 6.3 requirements unless identified herein. Vendor should add rows to the tables below as necessary. Absence of issues will constitute agreement for those items not herein addressed, and will be off the table for further negotiation.

. Check - Vendor agrees with Schedule 6.3, except for the elements listed in the table below.

Table 1. Relationship Management Requirements Issues

Redacted

5.7 Proposed Form of Work Order (Schedule 6.5)

Instructions to Vendors: As an attachment to Vendor's proposal, propose a Form of Work Order, which, if accepted by Commonwealth, will become Schedule 6.5 to the Comprehensive Infrastructure Agreement.

The Request For Service (RFS) will be initiated by the Commonwealth's Relationship Manger and delivered to the Commonwealth Partner's Relationship Manager for both In and Out-of-Scope Work Requests. The detailed process and procedures for addressing Work Requests will be documented in the mutually agreed upon change management procedure, which will be included in the Procedures Manual.

The Work Order will be initiated and signed by the Commonwealth Partners Relationship Manager with a written proposal for completion of the requested work that will include: specifications, implementation plans, and a firm price quote of the charge to implement the Work Request that is valid for ten (10) business days, unless stated otherwise on the Work Order. Prior to the expiration of the Response Period (ten (10) business days from the date of the Work Order) the Commonwealth's Relationship Manager will sign the Work Order, considered a Notice to Proceed authorization for work to begin. An example of the Work Order is attached for reference. The detailed process and procedures for the written proposals to complete a Work Request and Work Orders will be documented in the mutually agreed-upon change management procedure, which will be included in the Procedures Manual

Work Order Sample follows on the next three pages:



COMMONWEALTH OF VIRGINIA AND IBM CORPORATION PROJECT CHANGE REQUEST INFRASTRUCTURE SERVICES	
Section I – Project Change Request Administration	
Project Identification: Comprehensive Infrastructure Agreement	
Project Change Request Date:	Project Change Request No.:
Project Change Request Title:	Project Change Request Priority (Choose One): <input type="checkbox"/> Urgent <input type="checkbox"/> Ordinary <input type="checkbox"/> Low
Impact Level: <i>(risk analysis)</i>	Contract Direct Reference:
Originator's Name and Title:	Contracts Schedules / Exhibits Impacted:
Section II – Project Change Request Description	
Description of Project Change Request:	
Commonwealth's response to PCR:	
Justification for Project Change Request:	
Impact(s) if change is not done:	
Project Change Request Objectives:	
Resource Requirements:	
Implementation schedule to complete Project Change Request:	



Section III – Service Level Impact	
Service Level Coordinator:	
Impact on Existing Service Levels:	
New Service Levels applicable to this Project Change Request:	
Section IV – Project Change Request Cost/Fees	
Are there fee changes associated with this Project Change Request? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Costs to the Commonwealth of Virginia:	Fee schedules affected: <i>(Please list and attach all fee schedules which will be affected by this change.)</i>
Funding Source	
Lemuel Stewart, Program Director Virginia Information Technologies Agency	Signature _____ Date _____
Does this Project Change Request require an Impact Study to be conducted?	
<input type="checkbox"/> Yes <input type="checkbox"/> No	Cost of Impact Study:
Commonwealth Approval/Disapproval of Impact Study Charges (Approval constitutes authority for IBM to complete the Impact Study and charge the Commonwealth under the provisions of Schedule 6.5):	
Approved <input type="checkbox"/>	Not Approved <input type="checkbox"/>
Fred Duball	Infrastructure Program Manager Date _____
Impact Study Completion Date:	Results of Impact Study:
Terminate Project Change Request based on results of the Impact Study: Yes <input type="checkbox"/>	
Does this Project Change Request Impact the Disaster Recovery (DR) Services ?	
<input type="checkbox"/> Yes <input type="checkbox"/> No	If Yes, a Change Order must be generated.
Section V - Agreement and authorization to proceed with the Project Change Request as set forth above (This project change request will serve to modify the Exhibits/Schedules to the Comprehensive Infrastructure Agreement)	
For the Commonwealth of Virginia	
Fred Duball, Infrastructure Program Manager Virginia Information Technologies Agency	
Signature _____	Date _____
For IBM Corporation:	
Denise Slusser Senior Project Executive Commonwealth of Virginia Infrastructure Relationship Manager IBM Corporation	
Signature _____	Date _____



Agency/Secretariat IT Manager review: <i>(if necessary):</i>			
Printed Name, Agency	Signature	Title	Date
Project Change Request Termination:			
Printed Name, Title	Signature	Date	
Comment:			