

File 2: Organization Qualifications and Experience

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Part 1. Overview of the Organization

Statement of Qualifications

Civic Initiatives proposes a high caliber team, possessing deep knowledge, skills, and experience in providing supporting services to ensure successful implementation of procurement automation solutions.

Our team comprises more than 130 years of combined public service serving in public procurement, statewide policy management and administration, procurement automation and technology management and is uniquely positioned to advance our clients' procurement automation needs, by supplying:

- Keen insight and access to national and peer leading practices in all phases of acquisition support services as the leading provider on the NASPO Procurement of Acquisition Support Services master contracts in terms of overall Participating Addendums and number of projects completed on the contract.
- Six state level procurement automation sourcing engagements, four state level fit-gap reviews of ERP procurement automation and six key roles in implementation in the last five years, establishing Civic Initiatives as one of the most versatile and experienced public procurement automation service providers in the field
- Clear perspective and direct knowledge of the need to make procurement automation projects focus on change management and process improvement in order to deliver true transformation and benefit realization.

The Civic Initiatives team includes consultants that have served both as public servants and in consulting capacities for public sector entities. This background ensures a clear understanding of public procurement, local government environment and dynamics, and industry peer and leading practices necessary to perform the work outlined in the RFP, achieve the objectives of this project, and help the Client to accelerate its efforts to transform its procurement function.

Our Service Areas

Civic Initiatives was created by public procurement practitioners in 2010 with a specific focus on solving needs for procurement officers in a built for purpose methodology. We support public procurement offices in three main service areas:





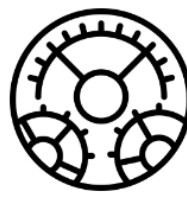
ACQUISITION SUPPORT SERVICES

"Instant-On" Staff Extension
Workload and Backlog Analysis
Group / Individual Staff Training
Category Market Assessments
Full Solicitation Management



STRATEGIC PROCUREMENT TRANSFORMATION

Program Benchmarking
Contract Portfolio & Spend Analysis
Policy/Process Redesign
Training & Certification Models
Contract/Grant Management Programs



PROCUREMENT AUTOMATION SUCCESS

Automation Readiness Assessments
Solution Definition/Platform Selection
Implementation Planning/Execution
Marketplace Creation/Maintenance
Change Management & Onboarding

Acquisition Support Services

Civic Initiatives supports procurement offices in providing acquisition support services – direct support of acquisitions events. Civic Initiatives is the leading provider under the NASPO Acquisition Support Services contract today in terms of number of projects and number of signed contracts. Work examples include:

- *"Instant on" Staff Extension:* Options to provide on demand purchasing extension to deal with surges in requisition management.
- *Workload and Backlog Analysis:* objective reviews of current staff loads and analysis of how to clear a backlog of requests in ways that are efficient and effective.
- *Group/Individual Staff Training:* A robust training portfolio on innovation in procurement methodology, supplemented by options for long term cohort or individual mentoring.
- *Category Market Assessments:* Professional procurement review of current or available contracts in a spend category and objective recommendations on sourcing strategies.
- *Full Solicitation Management:* Senior, certified procurement personnel available to manage full/complex solicitation events in a project milestone method.



Strategic Procurement Transformation

Civic Initiatives has a clear understanding of the difference between *procurement* and *purchasing*, and the needs of the organization to increase program capacity to be a strategic asset. Work examples include:

- ***Program Benchmarking:*** Review of programs in specific workstreams to establish maturity levels and performance measure opportunities.
- ***Contract Portfolio & Spend Analysis:*** Review of master contract portfolios and overall spend to create prioritized sourcing plans and opportunity assessments
- ***Policy/Process Redesign:*** Capture of key procurement processes and associated policy for optimization and redocumentation of the overall procurement process
- ***Training & Certification Models:*** Clear models for competency development and certification of staff to support role definition and competency plans
- ***Contract/Grant Management Programs:*** Creation of effective contract management programs to support business units and program staff in consistent and effective contract oversight

Procurement Automation Success

Civic Initiatives has a proven track record of success in helping procurement organizations assess their options and implement procurement automation in a way that emphasizes the business value and the opportunity for transformation.

- ***Automation Readiness Assessments:*** Review of program readiness for procurement automation, reviewing key indicators of successful transformation and providing a review of the procurement automation market.
- ***Solution Definition/Platform Selection:*** Elicitation and creation of procurement automation requirements, fit/gap reviews of current tools, and support of sourcing activities to select platforms
- ***Implementation Planning/Execution:*** Establishing project management to support, design, testing, project management through to steady state operations.
- ***Marketplace Creation/Maintenance:*** Review of client supply contracts marketplace implementation, and turnkey creation and implementation of robust catalogs.
- ***Change Management & Onboarding:*** Planning and execution of change management practices and planned onboarding for a variety of stakeholders, including department users and key vendors.

Civic Initiatives has garnered the trust of 30 states and a dozen local government, higher education, K-12 and other organizations by helping them transform their procurement functions. We have the functional and technical experience to design and drive change in procurement organizations and our experience and training is specific to the public sector. With a focus on acquisition support, strategic transformation, and procurement automation success, our customer-centric services are thoughtfully proposed with the procurement organization and their stakeholders in mind.



We have in-depth knowledge and understanding of leading procurement practices, processes, tools, and systems, and we can appropriately and effectively deploy these in an organization's business environment. We are vendor and system agnostic and can provide support to clients across any solution or combination of solutions. Our commitment to public sector procurement, impartiality, and keenness to consider a range of options to achieve appropriate outcomes often establishes leading practices in public procurement and automation.

Distinguishing Characteristics

Our approach to delivering implementation services to support an organization's procurement automation project drives successful outcomes for Clients. This approach encompasses:

1. A project team composed of multiple certified public procurement professionals with extensive experience in supporting public procurement entities to manage implementations of procurement automation solutions across all major functional workstreams.
2. A deep and unique understanding of current market solutions and rigorous system automation implementation methodology that allow us to provide support to Clients across any number of chosen procurement automation options.
3. A methodology and set of tools that enable us to execute projects in a virtual manner (if required), that have been proven through past use in similar projects.
4. A laser focus on delivering transformation through procurement automation projects to ensure they result in not only technical stability, but most importantly, true business value.

Procurement Automation Implementation Support

The team members proposed bring ample demonstrated qualifications and experience in public sector experience and public sector procurement automation implementation support, both at the State and Local level, critical to the execution of contracts awarded from this solicitation, as illustrated in the following:

- Served a combined 130+ years as public servants with states, cities, and local government entities many of which were in strategic roles as public procurement professionals
- Provided procurement automation support services for 28 public sector clients helping them to manage their implementations, support proper change management, develop, and deploy marketplace catalogs and provide testing and contract attainment support to ensure the Client received the solution they had acquired
- Provided procurement consulting services in 30+ states at all levels of government including state central procurement offices, state agencies, counties, cities, and other local government entities
- Project team members certified in public procurement including Certified Public Procurement Officer (UPPCC), Certified Public Procurement Buyer (UPPCC), Certified Procurement Professional (NIGP), and Certified Purchasing Manager (ISM), that can only be acquired through direct public procurement experience



Solution & Leading Practice Knowledge

Civic Initiatives' decades of experience as public procurement professionals and our depth of knowledge in the procurement automation space make us highly qualified to provide project management and implementation services tailored to our Clients' needs.

- Broad and active relationships with numerous market providers of procurement automation including both full suite and gap solution providers that enables us to remain aware of current market trends and leading practices in procurement automation
- Staff with current training and certifications in market leading solutions including knowledge of solution composition and functionality and system configuration management
- Demonstrated active configuration and management of implementations of solution functionality across several procurement automation solutions
- Active partnerships and/or delivery experience with leading market technology providers, including GEP, Ivalua, Jaggaer, Peoplesoft, Proactis, SAP/Ariba and Workday gives clients an ability to understand the market implications of various needs with an agnostic capacity

Toolset for Virtual Project Execution

Civic Initiatives is prepared to provide services onsite or virtually and anticipates no delays as the result of providing services virtually. We have made substantial investments in, and regularly use of, a suite of online services to ensure that clients will enjoy a reliable, high quality, interactive work relationship that is effective whether in-person or remote. A description of tools and technologies used in our engagements is provided under *Implementation Requirements, E.1. Project Management (File 3, Section III Proposed Solutions and-or Services_Inline)*.

Automation Readiness Assessment & Benchmarking

Civic Initiatives is a national leader in public procurement consulting that has provided numerous program and automation readiness assessments to public sector entities illustrating our:

- Current knowledge of procurement organization, policies, processes and supporting technologies gained through support of recent and relevant reviews performed in 30+ states and local government entities over the past 10 years and leading six state solicitations for procurement automation solutions
- Broad knowledge of national and peer leading practices in all phases of the procurement lifecycle including procurement planning, solicitation development, procurement execution, procurement evaluation, contract development and execution and contract management
- Knowledge of key procurement performance measures and relevant benchmarks necessary to ensure proper evaluation of Client strategies, operations, policies, and procedures for procurement and contracting
- Expertise in development of procurement and contracting organizational models and supporting staffing levels and resources
- Expertise in the implementation of transformation projects, including technology, tools, templates, guides and other resources to support the execution of processes in the procurement life



Part 2. Previous Projects

Experience and Expertise in Past Projects

As described in Part 1, our Procurement Automation Success service area helps procurement organizations assess their options and implement procurement automation in a way that emphasizes the business value and the opportunity for transformation. Three of the five services we offer in this category are directly related to the Scope of Services described in this RFP.

1. Automation Readiness Assessments: Review of program readiness for procurement automation, reviewing key indicators of successful transformation and providing a review of the procurement automation market.
2. Solution Definition/Platform Selection: Elicitation and creation of procurement automation requirements, fit/gap reviews of current tools, and support of sourcing activities to select platforms
3. Implementation Planning/Execution: Establishing project management to support, design, testing, project management through to steady state operations. (***Project Management, Project Implementation Methodology, Data Conversion Services, On-Site System Stabilization Support***)
4. Marketplace Creation/Maintenance: Review of client supply contracts marketplace implementation, and turnkey creation and implementation of robust catalogs. (***Catalog Support Services***)
5. Change Management & Onboarding: Planning and execution of change management practices and planed onboarding for a variety of stakeholders, including department users and key vendors. (***Organizational Change Management Services, Training Services***)

The following graphic provides a representative sample of clients, detailing our breadth and depth of work providing supporting services to public procurement entities to ensure procurement automation success. These projects represent project work of the same, or substantially similar, type, size, and scope of services described in this RFP.



	Automation Readiness Assessments	Solution Definition/Platform Selection	Implementation Planning/Execution	Marketplace Creation/Maintenance	Change Management & Onboarding
	Procurement Automation Success				
Client					
State of Missouri					
State of Ohio					
State of Rhode Island					
State of Nebraska					
State of Minnesota					
State of Vermont					
Commonwealth of Kentucky					
State of Alabama					
State of Hawaii					
State of Florida					
State of Oregon					
State of Washington					
State of Connecticut					
State of Maine					
State of Arkansas					
State of Louisiana					
State of Georgia					
State of North Dakota					
State of Arizona					
Commonwealth of Massachusetts					
State of Montana					
State of Michigan					
North Central Texas Council of Government					
Colorado University System					
University of Wisconsin					
Metropolitan Council					
County of Santa Barbara					
KIPP					

Although the graphic above provides an overview of the clients we have performed similar work for the following **Client Snapshots** provide project details for three (3) representative client projects.

Client Snapshot

STATE OF MISSOURI

Project Management and Testing Support for a full suite eProcurement solution implementation from initiation to attainment of steady state



PRIORITY

The State Office of Administration, Division of Purchasing, sought project management and testing support for their eProcurement solution implementation to ensure the successful configuration, testing, and implementation of the State's procurement automation solution.



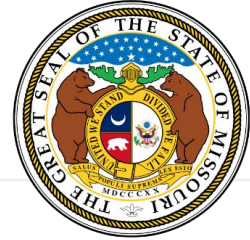
HOW WE HELPED

- Provided project and change management support to State through implementation
- Developed and implemented a project plan, with defined solution phases/deliverables
- Identified methodology for rolling-out the system to system end users and suppliers
- Reviewed proposals for system changes, enhancements or customizations
- Provided independent system testing and validation



OUTCOME

- Successful configuration, testing, and initial go-live of the State's eProcurement solution
- Rollout of 200 marketplace catalogs
- Successful rollout of solution to state agencies
- Achievement of steady state operations



ANNUAL BUDGET

\$34.6 billion

POPULATION

6.1 m

EMPLOYEES

75,000

Client Snapshot

STATE OF CONNECTICUT

Acting as the State's Project Management and testing lead in support of their full suite eProcurement solution implementation



PRIORITY

The State Department of Administrative Services, Procurement Services sought support for requirements traceability, contract acceptance and overall contract attainment to ensure a successful implementation of the State's sourcing and contracts management solution.



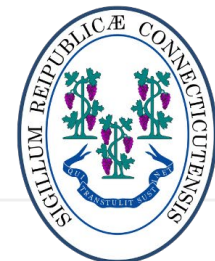
HOW WE HELPED

- Provided project and change management support to State through implementation
- Developed independent requirement traceability processes to validate that implementation was meeting project scope and requirements
- Developed performance measures to enable the State to track and demonstrate system value
- Developed system training for users



OUTCOME

- Successfully supported State in configuration and implementation of sourcing and contracts modules through go-live
- Developed, implemented and transitioned contract QA practice to State at go-live
- Performed QA testing to validate delivery of solution in accordance with requirements
- Developed and delivered 4 user training sessions detailing system use



ANNUAL BUDGET

\$23.2 billion

POPULATION

3.6 m

EMPLOYEES

50,000





STATE OF RHODE ISLAND

Acting as the State's Project Management and testing lead in support of their full suite eProcurement solution implementation

 PRIORITY The State Division of Purchases, sought project and change management leadership and testing support for their eProcurement solution implementation to ensure the successful configuration, testing, and implementation of the State's procurement automation solution.	 HOW WE HELPED - Managed the overall project and resources on behalf of the State, including Change Management - Developed and implemented a project plan, with defined solution phases/deliverables - Identified methodology for rolling out the system to system end users and suppliers - Reviewed proposals for system changes, enhancements or customizations - Provided independent system testing	 OUTCOME - Configured and deployed eProcurement solution to pilot agencies, including RIDOT - Completed integration between WebProcure and Oracle Financials - Onboarded more than 2500+ suppliers - Delivered 150+ catalogs - All new centralized sourcing events are now "online" and going through the new solution - Formalized and deployed enterprise OCM strategy	 ANNUAL BUDGET \$10.2 billion POPULATION 1.1 m EMPLOYEES 15,000
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Client References

The following provides four (4) references for work performed within the past five (5) years, necessary to substantiate the qualifications and experience presented in this proposal and illustrate our ability to provide the services substantially similar to those outlined in the RFP on schedule, on budget and meeting the agreed upon scope of work.

Reference 1: State of Missouri, Division of Purchasing

Dates of Service:	January 2013 – Present (multiple projects)
Contact Name, Title:	Karen Boeger, Director
Contact Information:	Address: 301 West High Street, Jefferson City, MO 65101 Phone: 573.751.1699 Email: Karen.Boeger@oa.mo.gov

Reference 2: State of Rhode Island, Division of Purchases

Dates of Service:	March 2018 – Present (multiple projects)
Contact Name, Title:	Nancy McIntyre, State Purchasing Agent
Contact Information:	Address: One Capitol Hill, 2nd floor, Providence, RI 02908-5855 Phone: 401.574.8100 Nancy.McIntyre@purchasing.ri.gov



Reference 3: State of Connecticut, DAS Procurement Services

Dates of Service:	September 2019 – April 2021
Contact Name, Title:	Tina Costanzo, Contract Manager/ Devin Marquez, Procurement Program Manager
Contact Information:	Address: 450 Columbus Boulevard, Hartford CT 06103 Phone: 860.713.5068/860.713.5381 Email: tina.costanzo@ct.gov / Devin.Marquez@ct.gov

Reference 4: State of Alabama, Division of Purchasing

Dates of Service:	July 2018 – Present (multiple projects)
Contact Name, Title:	Jerry Young, Deputy State Purchasing Director
Contact Information:	Address: 100 N Union Street, Suite 192, Montgomery, Alabama 36104 Phone: 334.242.7250 Email: jerry.young@purchasing.alabama.gov

Part 3. Subcontractors

In the course of responding to an individual Client Scope of Work Civic Initiatives may seek to engage subcontractors to augment its own staff to provide services detailed in our response depending on the size of the project. Civic Initiatives does not at this time have specified subcontractors to list in this proposal; however, Civic Initiatives is prepared to meet all subcontracting requirements and provide the specified details for subcontractors to the State of Maine and NASPO as may be required once a specific subcontractor is identified and will be utilized in the delivery of services under the ensuing contract.

Part 4. Organizational Chart

Project Team

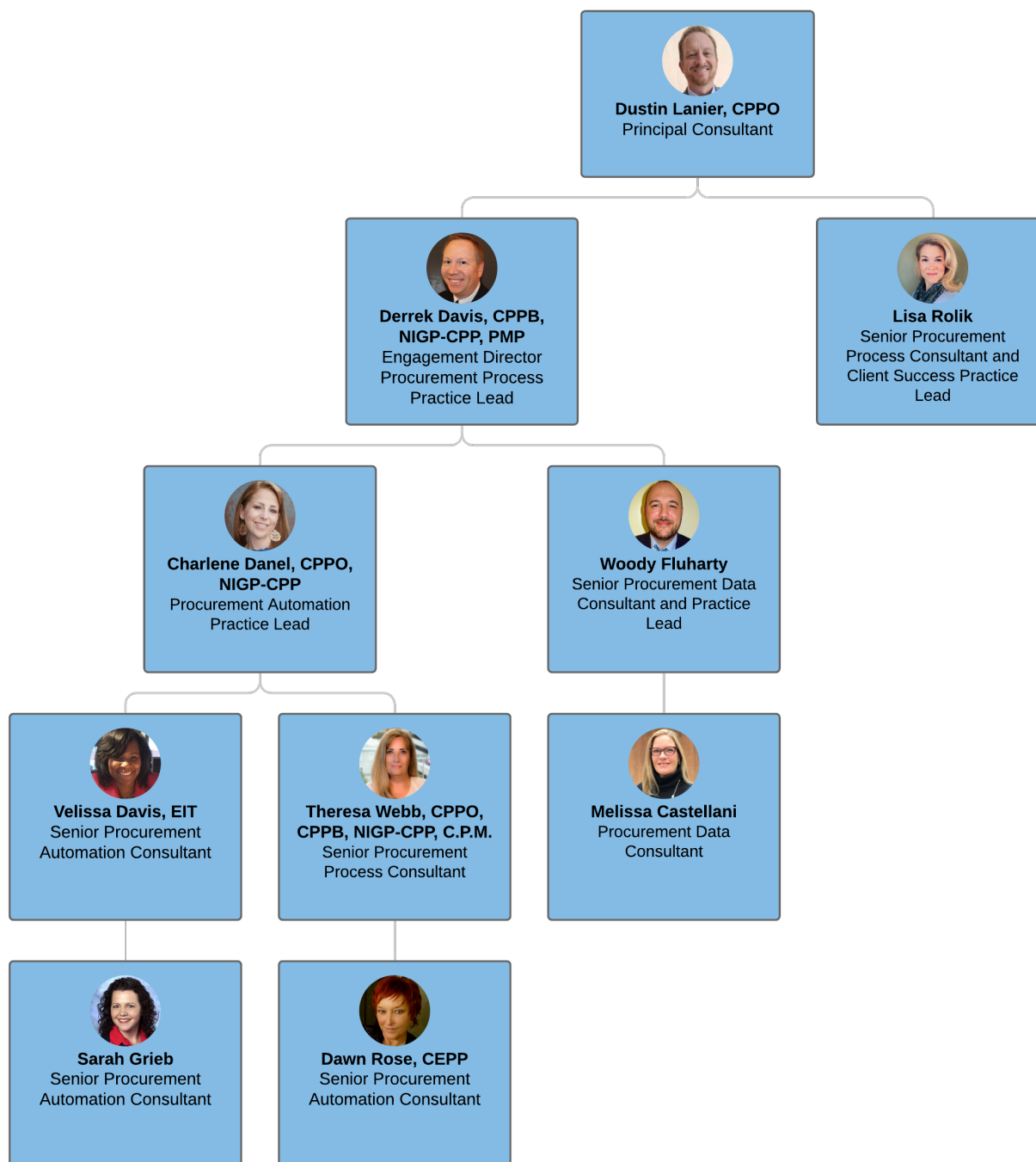
A critical factor in differentiating teams presented by multiple companies with admirable backgrounds is the following simple truth: ***Companies don't have resumes, people do.*** A Client must be confident that the team presented has actually performed the work, managed the project, and delivered the results that are consistent with the scope and complexity of services required by a procurement automation implementation project. A Client should expect to be presented with company experience that translates to the combined professional experience of proposed personnel. In this case, the resources described in this proposal have been the actual consultants executing work in exactly the manner detailed in this RFP.

Civic Initiatives has named long time company practice leads and consultants who have worked together on dozens of projects matching the requirements of the RFP. Together this project team, outlined in the table below, is uniquely qualified to support Clients on their automation implementation efforts.



Resource	Title	Project Roles
Dustin Lanier, CPPO	Principal Consultant	• Project QA/QC • Public Procurement Practices SME • Procurement Automation SME
Derrek Davis, CPPB, NIGP-CPP, PMP	Engagement Director and Procurement Process Practice Lead	• Engagement Director • Public Procurement Practices SME • Procurement Automation SME
Lisa Rolik	Senior Procurement Process Consultant and Client Success Practice Lead	• Contract Management Practice Lead • Public Procurement Practices SME • Procurement Automation Training Support • Client Success Manager
Charlene Danel, CPPO, NIGP-CPP	Procurement Automation Practice Lead	• Project Manager • Procurement Automation SME • Public Procurement Practices SME
Velissa Davis, EIT	Senior Procurement Automation Consultant	• Project Manager • Procurement Automation SME
Sarah Grieb	Senior Procurement Automation Consultant	• Project Manager • Procurement Automation SME • Public Procurement Practices SME
Woody Fluharty	Senior Procurement Data Consultant and Practice Lead	• Catalog Development & Support Lead • Sourcing Practices Lead • Data Analysis Lead • Public Procurement Practices SME
Theresa Webb, CPPO, CPPB, NIGP-CPP, C.P.M.	Senior Procurement Process Consultant	• Procurement Automation Training Lead • Public Procurement Practices SME
Dawn Rose, CEPP	Senior Procurement Automation Consultant	• Change Management Lead • System Testing Lead
Melissa Castellani	Procurement Data Consultant	• Catalog Development & Support SME

The team members detailed in the table above provide clients with resources that exceed requirements for experience and qualifications and can provide all services detailed in this proposal. Additionally, Civic Initiatives has staff with special knowledge, skills and abilities that will provide support and supplement the team as necessary to support the specific needs of the project. Each of the project team members is identified in the following organization chart.



Project Team Bios

The following are the bios for project key personnel performing work outlined in the Project Work Plan of this proposal. Refer to Attachment A for resumes for all staff proposed.

Dustin Lanier, CPPO

Founder and Principal Consultant

Dustin Lanier is an experienced professional with over 15 years of leadership in large scale organizational change in public sector initiatives of national significance. Through executive leadership roles in technology strategy and procurement strategy for the State of Texas, Dustin gained a strong experience in executing those strategies from concept to contracts. Dustin is a Certified Public Procurement Officer (CPPO).

Dustin is the principal consultant responsible for the strategy, direction and outcomes of client engagements, with a focus on innovative procurement, program maturity, optimization of the contract portfolio, and managing vendor relationships. Dustin has personally established client engagements for over 26 clients nationwide.

Key Accomplishments:

- Led multiple assessments of a state's procurement organization to determine strategic capacity and readiness for eProcurement. Leading development of new procurement and contract administration practices, requirement development and strategy for eProcurement, and support of business process redesign necessary to accomplish outcomes from tools.
- Led multiple assessments of a state's organizational model regarding information technology acquisitions, and successfully reconciled divergent views to establish cohesive transformation plans. Led development of staffing models and transition to new organizational approach to technology acquisition.
- Creation of a proprietary process to support states in creation of internal spend management programs, with an emphasis on support of staff capabilities, savings generation and calculation, and support of future automation through eProcurement.
- Creation of an extended training methodology for procurement professionals, designed to support a step program for professional development, and also to support nuanced delegation and certification models.
- Direct oversight of successful contracting initiatives in government operations, including energy, fuel, fleet, print, mail, document imaging, payment cards, GIS and contingent labor, producing biennial savings over \$37 million.

Dustin graduated with Bachelor of Arts degrees in Public Policy Studies, and in Latin American Studies, from Duke University.



Derrek Davis, CPPB, NIGP-CPP, PMP***Engagement Director and Procurement Process Practice Lead***

Derrek Davis has over 10 years of experience driving large-scale transformation of procurement practices for over 40 State, University and Local government entities. Derrek has industry experience in operational, organizational and technology evaluation of public programs and implementation of projects necessary to establish leading practices and drive innovation in procurement. Derrek also leads research, development and management of agency and statewide procurements from concept to contract.

At Civic Initiatives, Derrek is responsible for managing the full portfolio of client engagements ensuring that all projects and resources are actively managed, and all projects are meeting client expectations for scope, schedule and deliverables. Derrek also leads procurement assessment engagements, providing expertise and implementation support to public sector procurement organizations to enable them to transform their procurement operations.

Key Accomplishments:

- Managed the successful delivery of over 100 consulting engagements
- Led assessments for 27 State, University and Local public sector procurement organizations
- Managed the development of over 15 agency and statewide solicitations with an estimated value in excess of \$150m in total acquisition costs
- Drafted a Procurement Manual for 6 State central procurement offices, providing external guidance to customers on policies, procedures, roles and responsibilities
- Supported the implementation of transformation projects for clients leading to improved efficiency, effectiveness and automation of procurement practices
- Supported the development of nationally utilized, cutting edge models, methodologies, approaches and processes used in consulting practice

Derrek graduated with a Bachelor of Arts degree in Government and a Master of Arts degree in International Affairs from the California State University, Sacramento. Derrek also brings complementary current skills as a Certified Public Procurement Buyer (UPPCC), Certified Procurement Professional (NIGP), and a Certified Project Management Professional (PMI), and has held past certifications as a Certified Internal Auditor and Certified Information Systems Auditor.



Lisa Rolik

Senior Procurement Process Consultant and Client Success Practice Lead

Lisa Rolik is an experienced professional with over 10 years of public sector procurement experience. Through leadership roles in procurement and contract management for the State of Nebraska, Lisa gained a strong experience in developing clear contract management processes and procurement strategies for a variety of governmental missions, including health and human services, law enforcement and state level category purchasing.

Lisa's roles in Nebraska state government included direct procurement responsibilities for the State Purchasing Bureau and State Patrol, and program creation and management for the Department of Health and Human Services, Division of Behavioral Health. As Program Manager II for Division of Behavioral Health, Lisa was responsible for creating processes and overseeing the administration of all services contracts and subawards for the division, managing the procurement process for services and IT commodities, and delivering contract management training to division contract managers.

At Civic Initiatives, Lisa is the Client Success Practice Lead who worked to design and implement Civic Initiative's Client Success Practice, and currently oversees the arc of client engagement through to project closeout, working to ensure client satisfaction and project success. As a senior procurement process consultant, Lisa supports assessment and transformation efforts in establishment of contract management programs and success of procurement transformation efforts as well as supports eProcurement implementation through training development and deployment.

Key Accomplishments:

- Supported the implementation of a new Integrated Contract Management Practice for the State of Missouri, including creation of a new Contract Management Guide, associated templates, and supporting training and tracking processes
- Designed and built the eProcurement training to deploy to the State of Connecticut agencies and local government entities
- Created a Services Contracts and Grant Management Guide for the State of Nebraska, DHHS-Division of Behavioral Health, and a Procurement & Contract Management Manual for the State of Maine; drafted a Contracting 101 Playbook for the University of Colorado Systems providing guidance to clients on policies, procedures, roles and responsibilities
- Supported the implementation of transformation projects for clients leading to improved efficiency and effectiveness of procurement practices

Lisa graduated with Bachelor of Arts degree in Economics from University of Nebraska – Lincoln and a Master of Public Administration degree from Bellevue University. Lisa is also certified in AchieveGlobal Training to lead Leadership and Service Training Programs at the Develop and Deliver Levels.



Charlene Danel, CPPO

Procurement Automation Practice Lead

Charlene Danel is an experienced procurement professional with over ten years of service spanning several statewide procurement programs. Prior to joining Civic Initiatives, Charlene managed multiple teams in the Strategic Sourcing Division and Statewide Procurement Divisions of the Texas Comptroller's Office.

She specializes in (1) Developing, implementing and managing statewide eProcurement systems; (2) assessing contracts and procurement operations to developing plans for successful eProcurement deployment; (3) leading and managing the entire life-cycle of high dollar contracts including category analysis, risk assessment, solicitation creation, negotiations and vendor management; (4) Designing and maintaining systems for tracking programs goals, policies, processes, procedures and performance measures; and, (5) Proactively identifying program risks and implementing innovative solutions.

Charlene holds the CPPO designation from the UPPCC, the NIGP-CPP, the Certified Electronic Procurement Professional from IPSCMI and has been certified by the state of Texas as a Certified Texas Procurement Manager and a Certified Texas Contract Manager.

Key Accomplishments:

- Worked with a non-profit Texas organization to review current technology trends and propose a vision for Texas in its biennial year (2036) which describes the technologies, practices and policies that are needed to strengthen citizen access to services, bolster informed decision-making, increase transparency, and improve the speed and quality services to citizens.
- Led the Civic Initiatives team that assessed the State of Washington's eProcurement needs and the suitability of proposed upgrades to the existing system and offered alternative solutions.
- Supported an independent assessment of the State of Texas' Health and Human Services Commission's (HHSC) procurement and contracting practices (people, processes, governance and technology). Developed a future procurement operating model and a roadmap with prioritized implementation projects, based on complexity, risk, cost, and benefit.
- Served on the project team to assess the state technology agency's progress in reorganizing its procurement and contract management functions. CPO sought to standardize processes that establish and manage more than 750 IT contracts with approximately \$2B spend per year. The team also produced a current state brief and identified success factors to identify opportunities for improvement in procurement operations and provide recommended strategies for achieving them.
- Conducted an eProcurement assessment for the states of Oregon, Minnesota, Washington, Louisiana, and Arkansas, including a comprehensive eProcurement system fit-gap analysis.

Charlene graduated from the University of Texas at Austin with a Bachelor of Arts degree in Government, and a Master of Public Administration degree from The University of Texas at Arlington.



Velissa Davis, EIT***Senior Procurement Automation Consultant***

Velissa Davis has over 15 years in private sector procurement, project management, and business process re-engineering experience. Velissa has a strong technology background that has been instrumental in helping clients define and adopt automation solutions and practices that meet their organizational needs. At Civic Initiatives, Velissa has demonstrated a proven ability to successfully collaborate with client stakeholder teams to accelerate understanding, analyze and make recommendations to strengthen processes, and drive overall project and automation success.

Key Accomplishments:

- Serving on the Project Management Team for State Procurement Automation Projects supporting business case development, requirements elicitation and definition, and solicitation development, management and evaluation, including demonstration and contract negotiations strategies support.
- Primary resource for planning and execution of the following in support of procurement automation planning:
 - Kaizen events
 - Agency BPR/Vetting events
 - eProcurement Industry Summit (pre-Proposal meetings)
 - Supplier Discovery events
 - Change Management
 - Stakeholder Management and Communications plans
- Serving as the Procurement Automation Lead for the State of Ohio Ohio|Buys eProcurement Solution Implementation
 - Coordinate/facilitate and draft State project materials, project presentations, and work products
 - Provide guidance to Business Leads, State Business Analysts, agency SMEs, and other state staff on strategy, design, test script development, testing, etc.
 - Interpret contract requirements for project staff
 - Key resource in risk and resolution management activities
 - Lead resource in test strategy development and execution
 - Review change requests for applicability and need; recommend priority
 - Lead resource in identifying system requirements for applications/tools that are to be replaced
 - Lead resource in identifying integration requirements for applications/tools that must connect with the eProcurement solution
 - Key resource in assessing eProcurement proposals for compliance/fit to functional and technical requirements
 - Participate in OCM and Training project activities to monitor effectiveness and provide SME input
 - Lead in the identification of opportunities for business process improvement
 - Provide review of work products and deliverables as appropriate

Velissa graduated with a Bachelor of Science degree in Physics from Allegheny College and a Bachelor of Electrical Engineering degree from Cleveland State University and is a certified Engineer in Training (EIT).



Sarah Grieb

Senior Procurement Automation Consultant

Sarah Grieb is an experienced professional with a background in procurement, big data analytics, technology, business, financial and accounts payable management and analysis garnered during her 13 years of services with the State of Nebraska, University of Nebraska, and University of Colorado. Her focus during this time included creating transparent processes and procedures that maximize resources, eliminate waste, and remove redundancies. Sarah has presented at national and regional conferences sharing best practices in eProcurement, consortium contract utilization, electronic bidding, reverse auctions, contract authoring, and data analytics.

At Civic Initiatives, Sarah is responsible for managing project and client relations for consulting engagements within the public sector portfolio. Sarah's inquisitive nature and extensive background in procurement technology systems allows her to strategically deliver best practice solutions. Sarah has worked closely with product developers at Amazon and multiple procurement software companies.

Sarah focuses on developing customer-centric processes that result in effectively procuring goods or services in the public sector while maximizing savings and increasing end user adoption. She has delivered training to more than 12,000 users in a variety of medium as well as created training plans and help desk functionality. While at the University of Nebraska, Sarah, served as liaison with UNL's Supply Chain Management department, recommending guest speakers or content to enhance classroom learning, as well as personally presenting on various topics related to supply chain management.

Key Accomplishments:

- Direct leadership experience managing agency and statewide procurements procurement process including accounts payable. Identifying solutions that focus on the most efficient process for all users involved in the procurement process.
- Experience and strong understanding of strategic sourcing including the use of technology tools, process evaluation, spend analysis, demand aggregation, category management, and supplier management techniques to optimize performance and increase the value of procurement dollars spent.
- Implementation of procurement technology solutions that drive down costs, increase competition, support procurement policies, focus on user acceptance, identify opportunities, and streamline the source to settle process.
- Extensive expertise in process mapping, problem solving, and effectively implementing solutions that maximize resources and eliminate waste/redundancy. Evaluation of public sector entities, including operational, financial, consulting and technology assessments.
- Strong understanding of business processes, financial analysis, strategic planning, risk management and stakeholder management.

Sarah graduated with a Bachelor of Science degree in Business Administration with an emphasis in Technical Studies and a Master of Arts degree in Public Administration from Bellevue University, Nebraska. Sarah also earned a Management Development Certificate from Harvard Graduate School of Education and has accumulated additional graduate credit hours in Big Data Analytics.



Woody Fluharty

Senior Procurement Data Consultant and Practice Lead

Woody Fluharty has significant public and private procurement experience in strategic sourcing, category management and data analytics. Before Civic Initiatives, Woody was instrumental in establishing the Strategic Sourcing Division within the Texas Comptroller's Office. The Division achieved great success in cost reductions and process improvements in many high-profile spend categories.

He specializes in (1) leading and managing the entire life cycle of high dollar contracts including category analysis, risk assessment, solicitation creation, negotiations and vendor management; (2) knowledge of strategic sourcing principles including extensive experience in category/commodity strategy, spend analysis, benchmarking, cost models and demand management; and, (3) analyzing massive data sets focused on mining pertinent business intelligence to drive cost reduction strategies. Woody Fluharty was certified by the state of Texas as a Certified Texas Procurement Manager and a Certified Texas Contract Manager.

Key Accomplishments:

- Conducted comprehensive spend analysis and savings diagnostic of over \$100B in paid voucher spend from multiple clients including Texas, Ohio, Missouri, Kentucky, Nebraska, Nevada, Colorado University System, Los Angeles, Kansas City, Portland, Maricopa County, Hennepin County, Collier County School District and Greater Valley School District. Work consisted of relating multiple databases, consisting over millions of rows, and mining those databases for actionable intelligence.
- Led multi-functioning category teams to develop procurement strategies in a wide variety of spend categories including: Wireless Services; Road Aggregate; Office Supplies; Mail Equipment; Mail Services; MRO; Job Order Contracting; Agriculture Equipment; Fleet; Food; Janitorial Services; Multi-Function Printers; IT Equipment; Trash Services; Temporary Labor; Furniture; Advertising Services; Medical Services; and Medical Supplies. Work included, but was not limited to, spend analysis, benchmarking, market analysis, risk identification, savings levers and negotiation strategies.
- Awarded and managed statewide contracts with an annual value over \$300M in the state of Texas resulting in significant savings and process improvements.
- Developed a best-in-class road materials program valued at over \$250M annually. The project resulted in hard dollar savings of over \$55M. Additionally, achieved soft cost savings through streamlining the procurement process.
- Completed contract portfolio analysis in Ohio, Nebraska, Vermont, Alabama, Florida and Missouri. The work identifies both the client's most critical contracts relating to eProcurement and assesses the current fit of the contract portfolio to an eMarketplace environment.

Woody graduated with Bachelor of Arts degrees in Political Administration, and Master of Arts in Public Administration, from Texas State University.



Theresa Webb, CPPO, CPPB, NIGP-CPP, C.P.M.***Senior Procurement Process Consultant***

Theresa Webb, Sr. Consultant, has over 30 years of experience in procurement leadership that includes the procurement of goods, services, technology, construction, capital improvement, grant funded projects, and special taxation funded projects as well as Purchasing Card (PCard) program administration and warehouse management at city, county, special taxing authorities and private industry.

Theresa's role at Civic Senior Procurement Process Consultant is manage projects for consulting engagements for public sector procurement clients, conducting assessments and analyses of client operations, and developing client deliverables that include training materials, policy and procedure manuals, and process assessment review recommendations.

Theresa also brings the competencies and complementary skills of NIGP-Certified Procurement Professional (NIGP-CPP), Certified Public Procurement Officer (CPPO), Certified Professional Public Buyer (CPPB), Certified Purchasing Manager (C.P.M.), Certified Professional in Supply Management (CPSM), and Florida Certified Contract Manager (FCCM)

Key Accomplishments:

- Extensive experience in the assessment, reorganization, and transformation of procurement organizations and warehouse operations including establishing centralized procurement functions; organizational restructuring to create efficiencies and improve quality; development and implementation of new processes and technologies such as business intelligence reporting; and development of comprehensive procurement policies, procedures, ordinances, manuals, and document templates.
- Comprehensive knowledge of operational planning, developing organizational strategies, and overcoming leadership challenges. Extensive expertise in conducting complex and highly sensitive solicitations and contract negotiations for goods, services, concessions, construction, CIP and in the complexities of grant funded projects including FAA, FTA, FEMA and DOT. Skilled in supplier relationship management, risk mitigation, and governing body interactions in both private and public settings.
- Robust background in strategic sourcing that includes market research and analysis, value analysis, and spend analysis. Experienced in best-value, performance-based, and outcome-based contracting; contract administration; and supplier performance oversight to maximize contracting opportunities.
- Proficient in leading procurement training and professional development webinars, workshop presentations and classroom sessions at the local, state, and national levels. Skilled in developing coursework curriculum and professional best practices. Extensive experience in delivering educational and informational sessions for entity leadership, departmental staff, end users, and members of the supplier community.

Theresa holds a Bachelors' degree in Business Administration from St. Leo University (FL) and a Masters' degree in Business Management from American Public University (WVA).



Dawn Rose, CEPP***Senior Procurement Automation Consultant***

Dawn Rose is an experienced Project Manager and Certified eProcurement Professional with over 30 years of progressive experience in managing complex client objectives, marketing, business analysis, business operations and budgetary management of professional, procurement and logistic supply chain program services. She is recognized for exceptional change management skills, instituting logistic and supply chain business optimization initiatives while leading technical integrations at varying levels of complexity.

Key Accomplishments:

- Project Manager for global implementation of Logistics Procurement software, training and support of bid cycle and business processes for both internal clients and external vendors.
- Quality Assurance Practice Lead for Procurement software implementations.
- Instrumental in defining and adapting new global IT support processes for Procurement and Transportation Management Applications and related tools. Instrumental in creating the process and governance for end user support. Created training documentation for users and provides training workshops for new software implementations.
- Performed global business analytics and project management methodologies, to drive implementation and adoption of new ERP applications and analytical tools to drive change management toward enhancement of business performance.
- Provided global application support in role of global super user, security and administrative system management.
- As a Business Operations Manager she led and trained technical and non-technical teams responsible for service delivery tools; managerial responsibility for 35 technical and business professionals, vendor selection, purchasing, contract management, budget forecast and P&L statements.
- Developed and led the strategic consolidation of global customer, field quality communication programs and IT hardware roll outs including asset recovery; ensured customer avoidance, mitigation and fixes were available for software and hardware quality issues.
- Led the migration and installation of over \$500 Million of global inventory and assets from Puerto Rico to North Carolina with a 99.9% success rate at go-live for a fortune 500 electronics manufacturing facility in 2008. Pristine management of technical services decreased production start-up cycle time affording a savings of \$250K on original budgetary forecast.
- Led migration of a 350,000 sq. ft. facility containing 3500 Storage libraries and engineering fixtures, installed, and tested within a 90-day period with a 20% reduction in planned schedule and a 99.8% go live success rate in 2009. This effort afforded an additional 23% gain on a \$1.2MM project.

Dawn holds a Bachelors' Degree in IT Business Management from Western Governor's University and has advanced training in Project and Change Management.



Melissa Castellani***Procurement Data Consultant***

Melissa Castellani has over 15 years of experience in project management and business process reengineering oversight. Through her project work, Melissa has developed expertise in Project Management, Issue Identification and Resolution Tracking, System Integration and Test Planning, Applied Analysis, Contracts and Negotiations, Requirement Gathering and Prioritization, Process Improvement, and Budgeting and Forecasting.

Key Accomplishments:

- Business Analyst for a public sector client implementing COTS eProcurement technology. Responsible for independent analysis, contract administration planning and requirement traceability, and contract portfolio conversion support activities.
- Business Analyst for public sector client supporting implementation of Oracle Fusion suite. Responsible for support of requirement and configuration discovery and supporting contract review and catalog conversion activities.
- Managed multiple Department of Defense programs for a private sector software company through entire life cycle. Developed program plans, schedules, budgets, performance measures, and coordinated key project activities from inception to closure.
- Program/Implementation Manager for PeopleSoft corporate financials upgrade from General Ledger, Accounts Payable, Accounts Receivable, Purchasing, Asset Management, Project Costing, and Inventory.
- Program Manager/Senior Master Planner for datacenter and Storage Company; Interliant Inc. Central point of contact for implementation of BMC software suite at four US datacenters. Managed over 25 resources, both internally and through consulting contracts. Managed all documentation and contracts with a multi-million dollar budget.
- Created all contract documentation related to all projects. Requirements gathering, RFP, SOW, Project plans, Issue resolution, milestone reviews, technical architecture, go live plans, testing plans, training, postmortem and lessons learned.
- Led negotiating team for external client resources. Through RFP process, negotiated client resources for each project. BMC and PeopleSoft employees were added to internal staffing resources to ensure timely completion and transfer of knowledge on both projects.
- Successful with analyzing requirements, identifying deficiencies, uncovering potential opportunities, and developing innovative and cost-effective solutions for enhancing competitiveness which increases revenues and improves customer service offerings.
- Defined unit test plans, expected results and issues log. Assembled the constituent parts of a system in a logical, cost-effective way, comprehensively checking system execution (all nominal & exceptional paths) and included a full functional check-out. Verified that the system met its requirements and validated that the system performed in accordance with the customer/user expectations.

Melissa graduated with a Bachelor of Arts in Political Science from the University of Rhode Island.

Part 5. Litigation

Civic Initiatives is not and has never been involved in any litigation.

Part 6. Financial Liability

Civic Initiatives has provided a recent copy of its Dun & Bradstreet Business Information Report Snapshot.

Business Information Report Snapshot

CIVIC INITIATIVES, LLC

D-U-N-S: 06-479-1826
ADDRESS: 7000 N Mo Pac Expy, Austin, TX, 78731, United States
Date: 03/31/2021

RISK ASSESSMENT

SCORES AND RATINGS				
Max. Credit Recommendation	PAYDEX® SCORE	Delinquency Predictor Percentile	Financial Stress Percentile	Supplier Evaluation Risk Rating
US\$ 45,000	80 LOW RISK	96 LOW RISK	69 LOW-MODERATE RISK	3 LOW RISK

MAXIMUM CREDIT RECOMMENDATION

Overall Business Risk

LOW

LOW-MODERATE

MODERATE

MODERATE-HIGH

HIGH

Maximum Credit Recommendation

US\$ 45,000

The recommended limit is based on a low probability of severe delinquency.

Dun & Bradstreet Thinks...

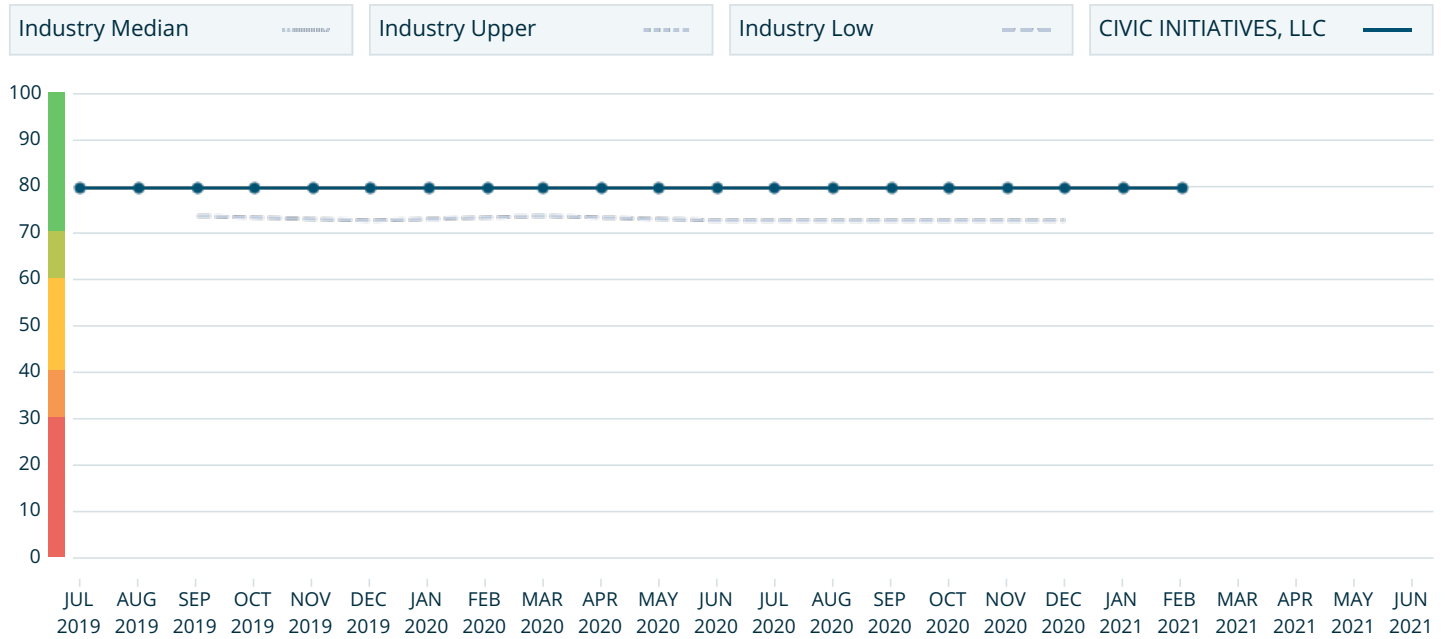
- Overall assessment of this organization over the next 12 months: VERY STABLE CONDITION
- Based on the predicted risk of business discontinuation: HIGH LIKELIHOOD OF CONTINUED OPERATIONS
- Based on the predicted risk of severely delinquent payments: VERY LOW POTENTIAL FOR SEVERELY DELINQUENT PAYMENTS

PAYDEX® SUMMARY	
3 Months Low Risk (100) High Risk (1)	24 Months 80 Low Risk (100) High Risk (1)

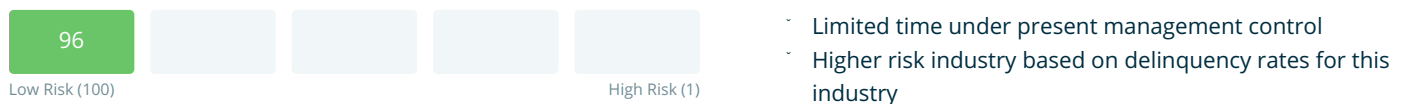
PAYDEX®			Based on 24 months of data	
80 Low Risk (100)			Risk of Slow Pay LOW	Payment Behavior Pays On Time
Based on a D&B PAYDEX® of 80				

Business and Industry Trends

8742 - Management consulting services



DELINQUENCY PREDICTOR SCORE

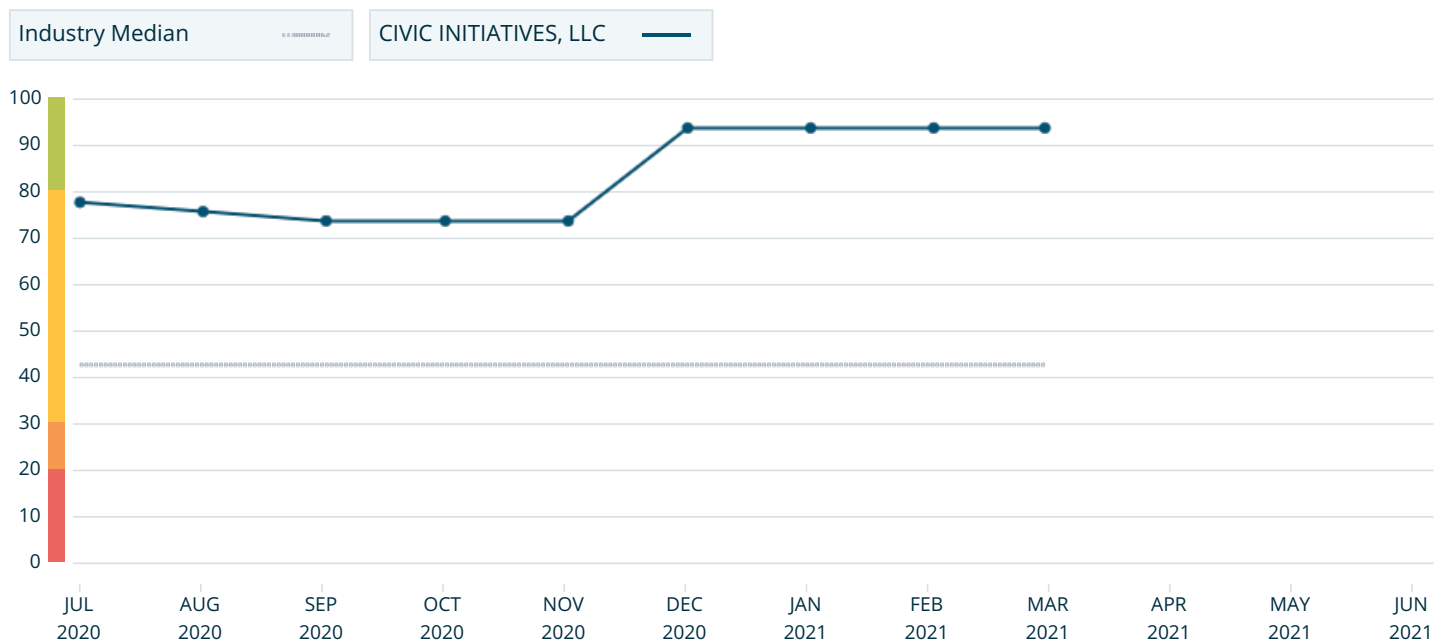


Based on a D&B Delinquency Predictor Percentile of 96

Level of Risk LOW	Raw Score 600	Probability of Delinquency 1.07%	Compared to Businesses in D&B 10.2%
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Business and Industry Trends

8742 - Management consulting services



FINANCIAL STRESS SCORE



Low Risk (100)

High Risk (1)

Low proportion of satisfactory payment experiences to total payment experiences

Based on a D&B Financial Stress Percentile of 69

Level of Risk

LOW-MODERATE

Raw Score

1512

Probability of Failure

0.14%

Compared to Businesses in D&B

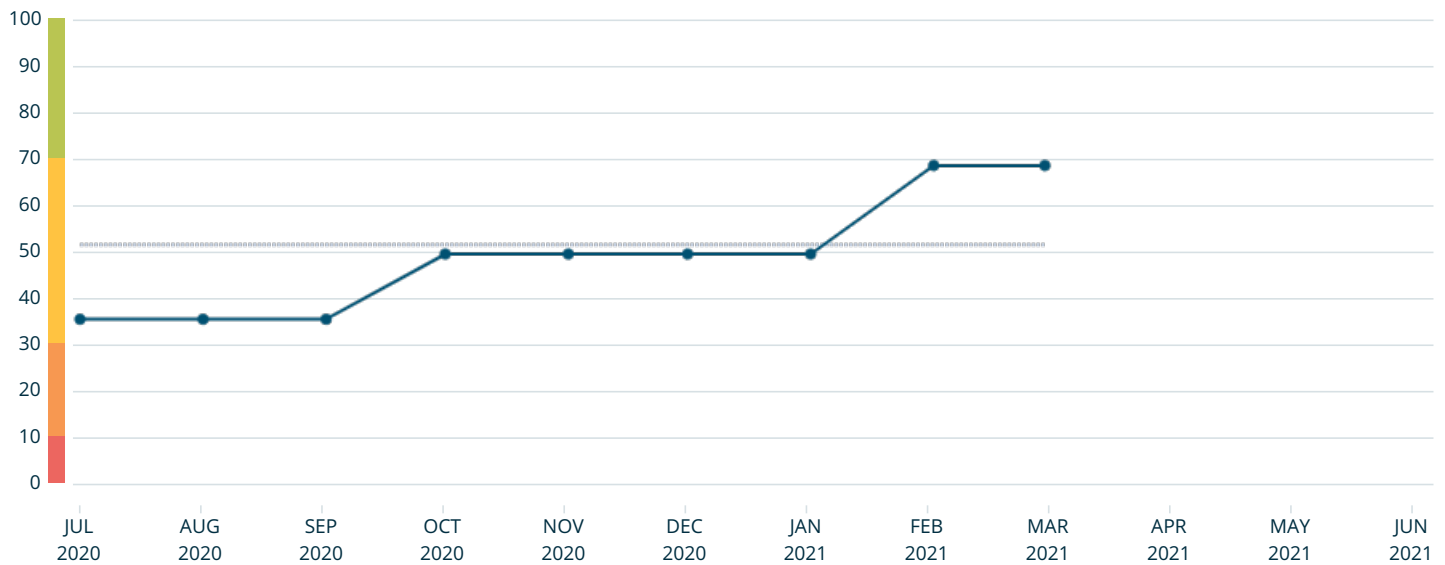
0.48%

Business and Industry Trends

8742 - Management consulting services

Industry Median

CIVIC INITIATIVES, LLC



SUPPLIER EVALUATION RISK RATING

3

Low Risk (1)

High Risk (9)

Based on a Supplier Evaluation Risk Rating of 3

Factors Affecting Your Score

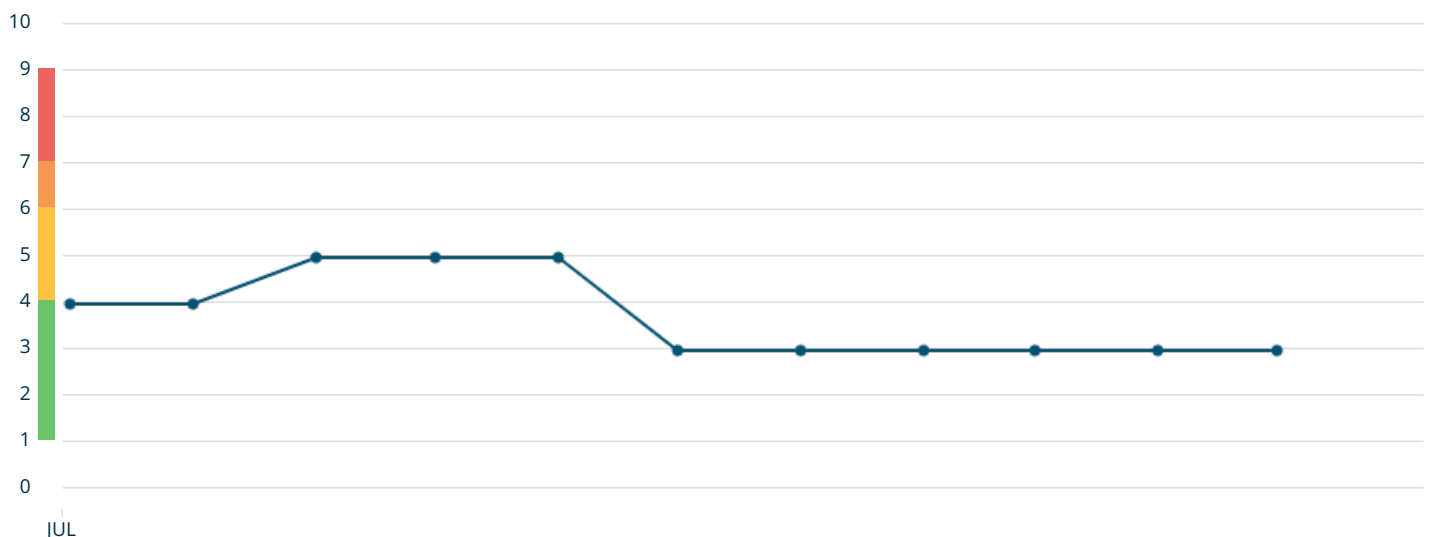
Limited business activity signals reported in the past 12 months

Financial statements not reported

Business and Industry Trends

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Supplier Evaluation Score



2020	AUG 2020	SEP 2020	OCT 2020	NOV 2020	DEC 2020	JAN 2021	FEB 2021	MAR 2021	APR 2021	MAY 2021	JUN 2021
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D&B RATING
Current Rating as of 07-14-2017
Special Rating
--: Undetermined

TRADE PAYMENTS

TRADE PAYMENTS SUMMARY			Based on 24 months of data
Overall Payment Behavior 0 Days Beyond Terms Highest Now Owing: US\$ 750	% of Trade Within Terms 100% Total Trade Experiences: 17 Largest High Credit: US\$ 10,000 Average High Credit: US\$ 3,666	Highest Past Due US\$ 0 Total Unfavorable Comments : 0 Largest High Credit: US\$ 0 Total Placed in Collections: 0 Largest High Credit: US\$ 0	

TRADE PAYMENTS BY CREDIT EXTENDED			
\$ CREDIT EXTENDED	% OF PAYMENTS WITHIN TERMS	# PAYMENT EXPERIENCES	TOTAL & DOLLAR AMOUNT
OVER 100,000	0%	0	\$0
50,000 - 100,000	0%	0	\$0
15,000 - 49,999	0%	0	\$0
5,000 - 14,999	100%	1	\$10,000
1,000 - 4,999	0%	0	\$0
UNDER 1,000	100%	2	\$1,000

TRADE PAYMENTS BY INDUSTRY			
Collapse All Expand All			
Industry Category	Number of Payment Experiences	Largest High Credit (US\$)	% Within Terms (Expand to View)
▼93 - Public Finance Taxation And Monetary Policy	1	10,000	
9311 - Public Finance	1	10,000	100
▼96 - Administration Of Economic Programs	1	750	
9611 - Admin Economic Prgm	1	750	100
▼73 - Business Services	1	250	
7374 - Data Processing Svcs	1	250	100

▼60 - Depository Institutions	1	0	
6021 - Natnl Commercial Bank	1	0	0

TRADE LINES						
Date of Experience	Payment Status	Selling Terms	High Credit (US\$)	Now Owes (US\$)	Past Due (US\$)	Months Since Last Sale

EVENTS

LEGAL EVENTS

The following Public Filing data is for information purposes only and is not the official record. Certified copies can only be obtained from the official source.

SUITS	JUDGEMENTS	LIENS	UCC FILINGS
TOTAL 0	TOTAL 0	TOTAL 0	TOTAL 0
LAST FILING DATE -	LAST FILING DATE -	LAST FILING DATE -	LAST FILING DATE -

General: The public record items contained in this report may have been paid, terminated, vacated or released prior to the date this was reported. This information may not be reproduced in whole or in part by any means of reproduction.

UCC Filings: There may be additional UCC Filings in the D&B file on this company which are available by contacting 1-800-234-3867.

Suits, Liens, Judgements: There may be additional suits, liens, or judgements in D&B's file on this company available in the U.S. Public Records Database that are also covered under your contract. If you would like more information on this database, please contact the Customer Resource Center at 1-800-234-3867.

Lien: A lien holder can file the same lien in more than one filing location. The appearance of multiple liens filed by the same lien holder against a debtor may be indicative of such an occurrence.

EVENTS

Events data is not available for this company.

COMPANY EVENTS

The following information was reported on: 12-30-2020

The Texas Secretary of State's business registrations file showed that CIVIC INITIATIVES, LLC was registered as a Limited Liability Company on November 10, 2010.

Business started 2010.

Business address has changed from 4103 Dauphine Dr, Austin, TX, 78727 to 5828 Linaria Ln, Austin, TX, 78759.

Business address has changed from 5828 Linaria Ln, Austin, TX, 78759 to 823 Congress Ave Ste 1433, Austin, TX, 78767.

Business address has changed from 823 Congress Ave Ste 1433, Austin, TX, 78767 to 7000 N Mo Pac Expy, Austin, TX, 78731.

Business address has changed from 7000 N Mo Pac Expy, Austin, TX, 78731 to 5828 Linaria Ln, Austin, TX, 78759.

Business address has changed from 5828 Linaria Ln, Austin, TX, 78759 to 7000 N Mo Pac Expy, Austin, TX, 78731.

SPECIAL EVENTS

12-30-2020

Civic Initiatives, LLC was reported by the SBA as a recipient of a Covid-19 EIDL loan for \$150,000 on 08/29/2020 under the Economic Injury Disaster Loan Program.

12-17-2020

CIVIC INITIATIVES, LLC was reported by the SBA as a recipient of a loan for \$311,900 from Frontier Bank of Texas on 04/28/2020 under the Paycheck Protection Program as authorized under the CARES Act of 2020.

12-10-2020

Business address has changed from 5828 Linaria Ln, Austin, TX, 78759 to 7000 N Mo Pac Expy, Austin, TX, 78731.

Financials

D&B currently has no financial information on file for this company.

COMPANY PROFILE

COMPANY OVERVIEW		
D-U-N-S 06-479-1826	Mailing Address 7000 N Mo Pac Expy, Austin TX 78731, US	Annual Sales -
Business Form Corporation (US)	Telephone (512) 523-4834	Employees 18
Date Incorporated -	Fax -	Age (Year Started) 11 years (2010)
State of Incorporation Texas	Website -	Named Principal DUSTIN LANIER, CEO
Ownership -	Line of Business Management consulting services	SIC 8742

OWNERSHIP

This business is not currently a part of a family tree.