

# Proposal for Consultant Services

## Proposal for State of Nebraska Department of Administrative Services (DAS) Materiel Division's Request for Proposals in Response to LB 1037

*Due Date: May 20, 2022 at 5:00 p.m. Central Daylight Time*



**Ikaso Consulting, LLC**

**Submitted By:**

**Ikaso Consulting, LLC  
533 Airport Blvd, Suite 400  
Burlingame, CA 94010**

**Response Contact:**

**Reiko Osaki, President and CEO  
Ikaso Consulting, LLC  
Phone: 415-734-6858**

## Transmittal Letter

May 20, 2022

From: Ms. Reiko Osaki  
President & CEO, Ikaso Consulting, LLC  
533 Airport Blvd, Suite 400  
Burlingame, CA 94010

To: Amara Block, Materiel Administrator  
Department of Administrative Services  
1526 K Street, Suite 130  
Lincoln, NE 68508

Re: Consultant Solicitation Letter 5-13-22

Dear Ms. Block,

Ikaso Consulting, LLC (Ikaso) is pleased to submit the attached response to the Nebraska Department of Administrative Services (“DAS”) Materiel Division’s request for proposals in response to LB 1037. Our response describes our team’s combined 170+ years of experience serving 21 state governments as independent and objective advisors, including highly relevant experience with procurement processes in various states, procurement reviews, procurement report drafting, and recommendations development. In particular, we have recently conducted procurement reviews, producing draft recommendations, followed by final reports, in the states of Arkansas, Hawai’i, Tennessee, Kansas, Indiana, South Carolina, and Iowa.

Based on the expertise detailed in our response, we are confident that DAS will find our team highly qualified to provide the services described in the request for proposals and LB 1037. If DAS would like more information, we would be pleased to further discuss our experience and our staffing approach.

Please do not hesitate to contact me with any clarification requests. I can be reached by phone at (415)-734-6858 or by email at [rosaki@ikasoconsulting.com](mailto:rosaki@ikasoconsulting.com).

Sincerely,



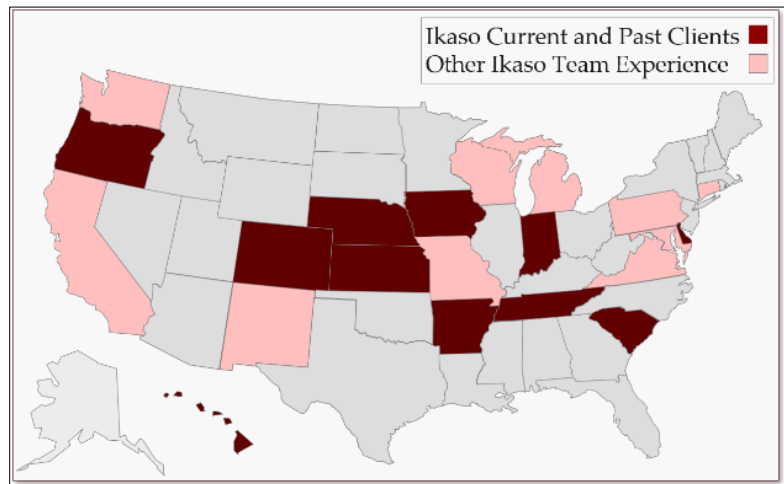
Reiko Osaki, President & CEO

# 1. Our Company Background and General Information

Ikaso has done one thing since its founding in 2008: advise state governments on procurement. This singular focus uniquely positions Ikaso to provide a depth of expertise with total objectivity. We believe our team’s extensive experience in 21 states provides the direct, relevant experience requested by DAS in their request for proposals and by the Nebraska Legislature in LB 1037.

Ikaso is the leader in end-to-end public sector acquisition services. We have been serving state government clients with a sole focus on acquisition-related work for nearly 14 years. Our work ranges from highly complex health, social services, and IT acquisitions, to commodity goods and personal services. Our projects provide support for the entire acquisition lifecycle of goods and services, as well as discrete lifecycle elements (e.g., negotiations, solicitation development, contract management). Relevant to Nebraska’s needs, we are the most experienced vendor you will find in the area of public sector procurement assessments. We also offer related acquisition services such as workload assessments and organization reviews.

Our team is solely focused on public sector acquisition. With over 170 combined years of public sector consulting experience across 21 states, Ikaso’s team members bring significant value through our extensive understanding of public sector (states in particular) acquisition organizations’ operations and procedures. Every single Ikaso team member brings direct and relevant public sector acquisition experience (including practitioners such as a former state government procurement director and an executive agency chief-of-staff), and we offer a cohesive team in which many members have worked together for almost two decades.



We tailor our work to each client’s specific needs. For each client, we strive to understand and embrace each client’s unique circumstances and requirements. Our first order of business is to become familiar with their specific environment, including priorities, needs, statutes, rules, and policies. This helps to ensure our approach, findings, deliverables, and recommendations address the very specific needs of the client.

The Ikaso team prioritizes performance and accountability. Because Ikaso only serves public sector clients, we understand the need for transparency, civic engagement, and accountability in our projects. We ensure our work product can withstand public scrutiny and that we stand ready to provide support to our clients for the implementation of recommendations.

Additionally, our independence prevents conflicts of interest. Ikaso's status as an independent (minority and woman owned) company with a singular focus on acquisition consulting averts conflicts of interest during the execution of all client projects.

Ikaso is eager and ready to serve the State of Nebraska. Our team resides across the nation, from coast to coast and several locations in between. We can offer the State a flexible, experienced, and dedicated team with a rich depth of knowledge about public sector procurement best practices.

## 2. Our Contract History

Ikaso has not had any contract terminated for breach or convenience in the last five years by any entity, governmental or private sector. In fact, in the 13+ years since Ikaso's founding, we have never had a failed project or a contract terminated before the contract end date. We attribute this success to our dedication to client satisfaction and desire to meet and exceed client expectations.

## 3. Our Proposed Priority Procurement Areas

We propose to evaluate the following procurement areas in accordance with LB 1037 and the request for proposals issued by the Materiel Director of DAS. Beyond what we know we will address as described below, we will begin our process by engaging, as appropriate, with stakeholders across the executive and legislative branches to identify other potential topics that may be relevant within the procurement process, and how such topics may have manifested in past challenges. Our takeaways from these discussions may add to and/or further inform our approach to what follows here:

### 3a. Due Diligence

As the first focus area listed in LB 1037, Ikaso will ensure that our approach and the final report underscores the vital role that due diligence plays in the public procurement process. Every step of the procurement process, from need identification through contract execution and during the life of the contract, requires due diligence from all parties. This ensures that State needs are met and public dollars are being well-cared for. As partners to state agencies for over 13 years, Ikaso proposes to evaluate due diligence by reviewing the policies and procedures by which the State verifies information received from vendors in response to bidding events. Due diligence is

required in this regard to ensure that a vendor can perform the responsibilities it says it can at the price it says it can.

Further, we plan to review the policies and procedures for contract monitoring and data reporting for State contracts. Ikaso has seen cases where all information was verified as accurate during the procurement process, but a lack of due diligence during the life of the contract led to poor vendor performance and necessitated corrective action plans. Ikaso believes that it is better to be proactive rather than reactive in these cases, actively monitoring service level agreements and standards.

### **3b. Evaluation and Scoring of Technical Merit**

Many procurements require an evaluation of technical merit as well as cost factors, and how that process is designed and managed is an essential element of public procurement. From our extensive experience, in particular with complex health and human services related procurements, we have seen the importance of proper planning in ensuring that the best overall vendor is selected to meet the state's unique and project-specific needs. In our review of existing procurement guidance and interviews with impacted stakeholders, we will be able to readily understand how the process works today and potential opportunities to apply new practices. We approach this review with a firm commitment to the idea that each solicitation and evaluation is unique, and that each requires different assumptions and evaluation methodologies.

### **3c. Evaluation of Cost**

As stewards of public dollars, state procurement officials face the difficult task of evaluating cost proposals for goods and services where the offered pricing must be aggressive, but it must also be realistic. In our review of written materials, we would also desire the opportunity to review previous cost evaluations to understand the variety of evaluation formulae and the relative weight as compared to quality of the proposal. Additionally, through stakeholder engagement, we propose to review the processes for developing cost methodologies to understand all aspects of cost evaluation, from bid development through contract award. As with the evaluation and scoring of technical merit, we recognize that no two cost evaluations necessarily should be handled in the same way.

### **3d. Accountability for Decision Making**

One of the features that distinguishes public procurement from its private counterpart is the commitment to transparency and fairness, and this includes accountability for decisions made throughout the procurement process. To begin a review of this accountability, we propose reviewing the State's workflow for a sample-set of procurements to understand who makes which decisions and when. This would include steps such as the development of specifications and scopes of work (including what is included, and how it is presented), identification of evaluators, the review of mandatory requirements, weighting of cost and quality, the decision to shortlist vendors, the decision to invite a vendor to vendor presentations, the decision to award,

and the decision to execute a contract. Understanding who makes these decisions and the order in which these decisions are made is crucial to evaluating accountability for each of these decisions. We propose to do this through both written materials review and stakeholder interviews.

### **3e. Protest Procedures**

Another unique component of the public procurement process is the ability for vendors who lose out on state business opportunities after a competitive bid to protest the State's decisions. Ikaso is familiar with procurement procedures in most states and has experience supporting both the refinement of protest procedures, and assisting clients with successfully responding to procurement protests across goods and services procurements, from commodities to Medicaid managed care contracts. While a written material review will be essential to understand how protests are intended to be handled and the effectiveness of current policy, we propose to also rely upon stakeholder engagement to understand and evaluate how protests are handled in practice, including outcomes of these protests vis-a-vis the best interests of the State and its constituents.

We propose the aforementioned areas as a starting point for project evaluation areas and not as limiting factors. We anticipate that additional priority areas may be identified in our initial conversations with DAS and stakeholders, and we will be sure to include those in our approach through the same analytical lens as the areas listed in this section.

## **4. Our Proposed Approach**

In order to conduct an evaluation of the areas in Section 3 and produce a report, Ikaso is recommending a five-step approach that meets the goals of DAS.

### **Step 0: Collaborate with State to Develop Project Framework**

Before we review a statute, perform an interview, or analyze any data, we believe it is critical to meet with the key stakeholders to establish your goals for the project. In this case that would include various legislators, including committee chairs for Government, Military and Veterans Affairs, and Health and Human Services, as well as staff from DAS, the Department of Health and Human Services, and other state agencies that have disproportionately large or mission-critical procurement activity. Beyond establishing goals for the project, our engagement with this group will help identify potential topics, issues, and themes from past procurement practices that may be relevant to the project.

We memorialize the agreed-upon goals into a "framework" which provides the lens through which we measure our progress and guide our inquiry. We have employed this approach in all of our similar client engagements, to great success. Goals in similar frameworks on similar projects have included Maximum Savings Creation, Process Transparency, Process Efficiency, and

Improved Oversight/Control. Each state is unique, and Ikaso will ensure that this project meets Nebraska's values and mission in addition to the objectives of LB 1037. The framework will help us customize a report and recommendations specific to Nebraska's needs.

### **Step 1: Review Legislation and Legislature Reports**

The next step in the proposed process is to develop a deep understanding of the work performed by the Nebraska Legislature that led to the drafting and approval of LB 1037. This includes a review of the bill, but also the review of any relevant minutes, drafts or other work products. It may also be beneficial, to the extent allowable and possible, to conduct targeted interviews with additional committee members and witnesses. This would enable us to both ensure we are best tracking the legislature's directives while also building on the considerable work already performed by DAS.

### **Step 2: Perform Review of Nebraska Law, Rules, and Procedures**

Our next proposed step involves conducting a comprehensive review of Nebraska's laws, rules, and procedures related to the procurement of goods and services, all done in the context of the project framework goals. Also, through interviews of stakeholders, we will outline and document where actual practices possibly depart from what the law intends or requires and where existing practices do not achieve desired results. From this exercise, Ikaso will develop a thorough understanding of the practices in Nebraska and prepare a comprehensive analysis of these practices in line with our proposed focus areas in Section 3. Additional stakeholder surveys are an optional method that can be included at this step at the request of DAS or if identified by the Ikaso team as necessary to the completion of this review and report.

### **Step 2: Form Recommendations Regarding Primary Focus Areas**

In this step, we will analyze the results of our Steps 1 and 2 reviews and identify the elements where the State could benefit from potential changes to statute, rules, or procedures. Ikaso possesses unique capabilities to produce meaningful recommendations; having performed procurement work in 21 states across team members, we have seen what works and what does not. Our perspective on industry best practices will inform each recommendation we make. Most importantly, our development of recommendations will be driven by the project goals developed in the framework during Step 0. From this, we will bridge theory and practice.

Recommendations without proper context are not valuable, so for each recommendation we propose to 1) identify the proper place to memorialize the proposed change (e.g., statute, rule, policy); 2) identify internal and external stakeholders impacted by the proposed change and their likely degree of support/reluctance (as gleaned from our experience implementing similar changes); and 3) determine the complexity of the change and the degree to which it departs from current requirements and practices (as determined by an analysis of the change, our experience, and an analysis of available data). This complexity analysis would also include an analysis of available data to attempt to quantify the impacts of proposed changes.



#### Step 4: Memorialize All Findings in Draft Project Report by September 1st

Next, we will prepare a comprehensive Project Report draft which includes the analysis in Step 2, the recommendations of Step 3, the considerations of each recommendation developed in Step 4, and how the totality of the report advances the goals outlined in Step 0's framework. We will work closely with DAS and the legislature both to ensure alignment with project goals and to produce a draft report by September 1st, or other date as may be applicable. We also will gather stakeholder feedback on the report and any recommendations contained therein, promptly incorporating any comments and edits.

The following example images are taken from our work providing recommendations in the context of framework goals with two different clients. The first image is taken from a client report and the second image is taken from a client presentation. Both figures depict the project's unique framework goals graphically on the right side via ideogram buttons. The specific recommendations have been intentionally obscured out of respect for those clients.

**Recommendations:**

Rec. #	Details					
1-1	Implement a... (text obscured)				✓	✓
1-2	Use a... (text obscured)	✓	✓	✓	✓	✓
1-3	Use a... (text obscured)	✓	✓		✓	✓
1-4	Provide a... (text obscured)		✓		✓	✓

**Recommendations Summary**

Based on our Phase 1 findings, we developed 14 recommendations to achieve the Division's project goals.

Area	Recommendation	Framework Criteria Impacted				
		Executive Oversight & Admin.	Collab. & Info Sharing	Streamlined Business Processes	Efficient Workflow / Best Pract.	
Organization	...	✓	✓	✓	✓	✓
	...	✓	✓	✓	✓	✓
Business Processes (Division)	...	✓	✓	✓	✓	✓
	...	✓	✓	✓	✓	✓
Business Processes (Agencies)	...	✓	✓	✓	✓	✓
	...	✓	✓	✓	✓	✓
Technology	...	✓	✓	✓	✓	✓
	...	✓	✓	✓	✓	✓

#### Step 5: Ensure Submittal of Final Project Report to Legislature by November 15th

Finally, after incorporating all feedback on the draft report, we will work with DAS to conduct a final review of the report and prepare it for submission to the Legislature.

Please see Section 9 for our proposed timeline using this approach.

## 5. Our Proposed Team

Ikaso has a number of team members with experience and subject matter expertise in the focus areas listed in Section 3, including the focus areas explicitly included in LB 1037. As such, we are proposing a team of four resources, which will allow us to bring a depth of experience and topical subject matter expertise to the project. If awarded this opportunity, we may identify



additional Ikaso team members whose expertise aligns with this project and whose work will be crucial to the successful completion of this review and report.

Our proposed staffing structure is provided below. Our team will be led by our Project Director, Mr. Thomas Arnold. Tom has led procurement evaluations in five states, in addition to procurement execution work in six additional states, with a strong focus on complex Medicaid-related solicitations. His experience directing projects that are similar in scope to the project work described in the request for proposals and in LB 1037 will help ensure the success of this project.

The proposed Ikaso staffing structure will also include an experienced Project Consultant, Wil Stowers, and two Subject Matter Experts, Matt Lewis and Erin Kremer. The team will be rounded out with additional consultants, all of whom have worked exclusively in state procurements, and many of whom have conducted reviews and developed reports similar to the work desired by the State of Nebraska. If fortunate enough to be awarded the opportunity to conduct this important work on behalf of the State of Nebraska, we will quickly identify additional team members to ensure that the scope and timeline of this project will be met.

Provided below is a chart that shows the experience of each proposed staff member with the primary areas of focus listed in Section 3, illustrating a well-balanced, qualified, and flexible team who is ready to support Nebraska DAS' needs. For our team resumes, please see Appendix A.

<b>Name (Team Role)</b>	<b>Due Diligence</b>	<b>Evaluation and Scoring of Technical Merit</b>	<b>Evaluation of Cost</b>	<b>Accountability for Decision Making</b>	<b>Protest Procedures</b>
<b>Tom Arnold</b> (Project Director)	✓	✓	✓	✓	✓
<b>Wil Stowers</b> (Project Consultant)	✓	✓	✓	✓	✓
<b>Matt Lewis</b> (Subject Matter Expert)	✓	✓	✓	✓	✓
<b>Erin Kremer</b> (Subject Matter Expert)	✓	✓	✓	✓	✓

## 6. References

Ikaso is pleased to provide the following three references who can speak to our procurement review and report work product:

1. Jillian Thayer, Legal Counsel  
Bureau of Legislative Research  
Little Rock, Arkansas  
(501) 683-0720  
[thayerj@blr.arkansas.gov](mailto:thayerj@blr.arkansas.gov)
2. Bonnie Kahakui, Acting Administrator  
State Procurement Office  
Honolulu, Hawaii  
(808) 587-4702  
[bonnie.a.kahakui@hawaii.gov](mailto:bonnie.a.kahakui@hawaii.gov)
3. Mike Perry, Chief Procurement Officer  
Central Procurement Office  
Nashville, Tennessee  
(615) 741-3625  
[mike.perry@tn.gov](mailto:mike.perry@tn.gov)

## 7. Our State Clients

Ikaso has worked with 11 states over its 13 year history. We have worked with 7 different states on projects of similar scope to Nebraska's needs. Ikaso is proud to hold a Procurement Acquisition Support Services (PASS) Master Agreement contract from National Association of State Procurement Officials (NASPO) ValuePoint. Ikaso has a Participating Addendum with several states and will welcome an opportunity to sign a Participating Addendum with Nebraska.

We have detailed the experiences of three recent projects performed that were similar in scope to the DAS' needs, in order to illustrate our skills and fit for this project. Further, both the Arkansas Report and the Hawaii report are available as public record and have been submitted with the proposal at attachments.

In 2015, Ikaso supported the State of South Carolina's initiative of conducting a review of procurement policies, laws, and procedures and the training of procurement staff. Our team dedicated hundreds of hours to this initiative both remotely and in Columbia. This culminated in an extensive report which included 14 detailed recommendations based on a State-approved

framework of four goals essential to an effective procurement process. The report included recommendation summaries and categorization, rationale, risks and mitigation strategies, and implementation plans and timelines. Each recommendation also included an implementation approach and change management strategy. After the recommendation report was delivered to key project stakeholders, South Carolina opted to keep Ikaso engaged through the recommendation implementation phase of the project which included the development and support in selecting a strategic sourcing consulting partner for South Carolina, the development of a new procurement manual and procurement staff training materials.

In 2019, Ikaso supported the State of Arkansas legislature’s goal to modernize their procurement law, codes, policies, practices, and procedures. We were selected in a process run by a legislative subcommittee, and worked closely with both the legislature and executive branch agencies to produce an in-depth analysis and recommendations for change. Our team provided Arkansas with 62 in-depth recommendations that could lead to actionable improvements, and we later supported the drafting of legislation based on those recommendations. As a result of our collaboration with the state, the multiple bills to reform their procurement environment were passed into law by the Arkansas legislature.

In 2019 Ikaso was contracted to provide the State of Hawaii with a detailed analysis comparing Hawaii’s procurement standards and practices to those of the federal government, with the goal of improving outcomes relating primarily to construction procurements. In pursuit of providing the most comprehensive and useful information possible, our team surveyed the written materials for the procurement process of the State and the federal government, interviewed individuals on both sides of the process, and analyzed findings to produce meaningful recommendations for the client. Our team critically assessed each potential difference in procurement process to determine if a change would add value to the client’s operations. We then supported the client by drafting statute and rule-change verbiage. This work was performed leveraging our NASPO PASS Agreement.

In 2020, Ikaso assisted the State of Kansas with an in-depth procurement process review as they transitioned their State Procurement Director position. Using a strategy similar to what we propose for DAS, we launched a critical analysis of the State’s capacity and identified areas of improvement. Working closely with the incoming Director, we identified five “Priority Topics” for meaningful improvement that were essential to achieving the State’s goal of ensuring a healthy and “holistic, long-term view of Kansas’ procurement process.” We produced actionable recommendations organized around these priority topics, which added additional value to the Director transition period.

## 8. Our Federal and Local Clients

Ikaso exclusively works with public sector partners, with a core focus on procurement. As such, Ikaso's experience with procurement has primarily supported efforts at the State level. Federal and local experiences relevant to this project are detailed below.

Ikaso holds a Professional Service Schedule contract from the U.S. General Services Administration (GSA). Under this schedule, Ikaso offers three specific services:

*Special Item Numbers (SINs)*

- 874.1 - Integrated Consulting Services
- 874.6 - Acquisition Management Support
- 874.7 - Integrated Business Program Support Services

All three of our SINs map to the same North American Industry Classification System (NAICS) Code, which is 541611. Please visit the following webpages for more information on our GSA Contract: [Ikaso's GSA Catalog](#) and [GSA Contract Landing Page](#).

In addition to Ikaso's agreement with the GSA, we are also contracted with Purdue University in West Lafayette, Indiana to provide ongoing procurement and acquisition support services. These services include market research and benchmarking, data and spend analysis, procurement drafting, evaluation support, and award support.

## 9. Our Proposed Timeline and Workplan








Ikaso will leverage its extensive experience to meet the deadlines provided by DAS. As outlined in Section 4, our approach has 5 phases. Our timeline displays these phases at a high level. We do not anticipate an issue with meeting DAS' September 1st deadline for a Report Draft, ahead of a finalized version to be submitted to the State legislature by November 15th.

We propose a project plan that condenses the research period by simultaneously engaging in Steps 1 and 2. We are confident in this approach due to our experience in producing meaningful, impactful results for our clients on similar projects within similar time constraints. Further, we will be committing several senior staff and leadership positions to this project to ensure its success.

Once we have completed our reviews of Nebraska legislation, legislation reports, laws, rules, and procedures relating to procurement, we will analyze the findings and synthesize our results into recommendations. These recommendations will then be analyzed using our industry specific expertise and analytical tools. We will ensure 3 key steps are taken in the vetting of our recommendations: 1) identify the proper place to memorialize the proposed change (i.e., statute, rule, policy); 2) identify internal and external stakeholders impacted by the proposed change and

their likely degree of support/reluctance (as gleaned from our experience implementing similar changes); and 3) determine the complexity of the change and the degree to which it departs from current requirements and practices (as determined by an analysis of the change, our experience, and an analysis of available data). This complexity analysis would also include an analysis of available data to attempt to quantify the impacts of proposed changes.

When the recommendations have been properly analyzed, they will be memorialized for DAS’ review in a “Draft Project Report” by September 1, 2022. In the period between the receipt of the “Draft Project Report” and official submission of findings to the State legislature, we will work closely with DAS to refine the report to ensure that our findings are actionable and meet DAS’ needs.

Phase	June 2022	July 2022	August 2022	September 2022	October 2022	November 2022
<b>Step 0</b> Collaborate with DAS to develop project framework						
<b>Step 1</b> Review legislation and legislature reports						
<b>Step 2</b> Review Nebraska law, rules, and procedures						
<b>Step 3</b> Form recommendations regarding primary focus areas						
<b>Step 4</b> Memorialize findings in a Draft Project Report						
<b>Step 5</b> Submit Final Project Report to legislature						

## 10. Our Proposed Cost

Below is our proposed price structure, which is deliverable-based. We have broken this up across four deliverables and plan to invoice the State directly seven calendar days after the submission of each deliverable, with the final invoice issued at the end of November 2022.

The below prices do not include travel to Lincoln or any other location in Nebraska. We are able to complete the project remotely leveraging video and phone conference technology. We are willing to travel at the State’s request and will include travel reimbursements on milestone invoices. We will accommodate any and all Nebraska travel reimbursement policies or procedures.

<b>Deliverable Description</b>	<b>Proposed Deliverable Submission Date</b>	<b>Proposed Deliverable Invoice Date</b>	<b>Invoice Price</b>
Initial “Kick-Off” Meeting	June 1st, 2022	June 8th, 2022	\$35,000.00
Presentation and Submission of Project Review Framework and Workplan	June 15th, 2022	June 22nd, 2022	\$65,000.00
Presentation of Draft Project Report to DAS	September 1st, 2022	September 8th, 2022	\$200,000.00
Submission of Final Project Report to Legislature	November 15th, 2022	November 22nd, 2022	\$100,000.00
<b>Total</b>			<b>\$400,000.00</b>

We would like to underscore that our price is based on our experience with similar projects in other states. We believe our references and experience information submitted in this proposal establish our deep understanding of this type of work, and our proposed approach is based on our successful track record. We also believe that you will find our price is at or below those offered by competitors that may not have the directly- applicable experience and references we provide in our proposal. We are confident that you will find our pricing proposal to be reasonable and realistic.

Additionally, this deliverable-based price proposal comes with a guarantee of high availability of Ikaso team members, who reside across four different US time zones and hold standard business hours of 8:00 AM Eastern to 6:00 PM Pacific with additional availability after-hours and on weekends at no additional cost.

## 11. Other Relevant Information

Considering the need to complete the initiative with a successful result on the schedule required by law, we believe Ikaso is the only firm in the country that has the full and proven experience required by the State. In particular the requirement for an evaluation that is collaborative and involves members of both the legislative and executive branch agencies is a capability that we believe we uniquely hold, as our references can attest. Ikaso couples this with a team that has successfully completed a variety of other, similar engagements around the country. Our team is excited to work with the State to complete this important work and we appreciate your consideration.



## Appendix A. Our Proposed Staff Resumes

### **Thomas Arnold, Project Director**



#### **Duties and Responsibilities:**

Tom is a Director with Ikaso. As the Project Director for the Nebraska Procurement Policy Review, Tom will oversee the entire engagement. He will manage the team, access Ikaso resources and staff as appropriate, review and approve all work products, coordinate with State staff, and ultimately be the person responsible for the deliverables discussed in this proposal. Tom will initially focus on engagement with the core user group to ensure the effort is structured to meet the State's needs and quality targets are identified. He will then remain focused on the collection of materials and the structured analysis that will reveal best

practices and options for the State's consideration for template deployment.

#### **Industry and Related Experience:**

For the past 18 years, Tom has focused on serving state government clients, working with 11 states in the areas of public-sector procurement and contracting, procurement organization transformations, and contract and performance monitoring. Tom has both managed and advised teams for state procurement transformation projects, directed statewide strategic sourcing projects, and led several multi-billion-dollar, high-profile health and human services procurements. Tom's experience includes service to both executive and legislative branches of state government.

#### **Notable Accomplishments:**

##### **2019-2020: Hawaii State Procurement Office**

Tom served as the Project Director for the Construction Procurement Policy Review project with the State Procurement Office. In this role, Tom supported a team of four in its comprehensive review and comparison of the State's procurement statutes, rules and policies related to construction compared with the federal analog practices in the Federal Acquisition Regulations. This engagement also included numerous interviews with State stakeholders invested in the construction procurement process both to better understand the challenges facing the State and better inform Ikaso's recommendations. The final report for this project was submitted to the Hawai'i legislature in early 2020.

##### **2017-2018: State of Arkansas, Arkansas General Assembly Review Subcommittee**

Tom led a project commissioned by Arkansas' Legislature to review the laws, regulations, policies, procedures and practices of the state's procurement, contracting and vendor

management capabilities. This project, which included interviews of dozens of stakeholders and a review of thousands of pages of written materials, culminated in a comprehensive final report of recommendations. Following the final report, Ikaso supported the Subcommittee in developing draft legislation, including providing testimony in six hearings.

### **2011-Present: State of Tennessee, Department of General Services (DGS)**

Tom served as the project manager for a team supporting a comprehensive consolidation, restructuring, and process improvement program for Tennessee's newly-created Central Procurement Office. This work included review and reconciliation of separate procurement laws for goods and services, development of new procurement rules and policy, the design and implementation of a new organization structure, independent oversight for the state's strategic sourcing project, and the training of state staff. He presently serves as an advisor to a team that supports strategic acquisition projects and savings validation efforts through a savings monitoring process and assessment tool developed by Ikaso.

### **2010-Present: State of Indiana, Department of Administration (IDOA)**

Tom serves in an advisory role providing consulting services to IDOA for a collaborative procurement program benefitting state agencies, local governments, libraries, and K-12 schools through coordinated procurements and improved access to state contracts. Tom also advised IDOA in the areas of organization assessment and strategy, and minority-, women-, and veteran-owned business enterprise strategy and operations.

### **Education:**

M.B.A., Harvard Graduate School of Business Administration  
B.A. Economics and Asian Studies, Colgate University

### **William Stowers, Project Consultant**



### **Duties and Responsibilities:**

Wil is an Associate with Ikaso. As a Project Consultant on Nebraska Procurement Policy, Wil will contribute to the project goals through careful review and analysis of state-specific statutes and administrative rules to compile a list of discrepancies between policy and practice, if any exist. Leveraging his experience and knowledge of procurement practices in several other State, Wil will also identify policies and practices that can be improved to meet the State's goals. Additionally, he will help develop and refine the least onerous method of implementing any recommendations from Ikaso's analysis. Finally, Wil will support the Project Director in ensuring the quality, accuracy, and timeliness of project deliverables.

### **Industry and Related Experience:**

Wil's public sector experiences range from local governance to federal policy analysis. With an academic background in reviewing statutes and rules and their effect on state governance, Wil has demonstrated the ability to draw insights from policies and practices and demonstrate the implications that such a review can have for State employees and all constituents. Through his work on the Construction Procurement Policy Review project with the Hawaii State Procurement Office and the Procurement Policy Review with the Kansas Office of Procurement and Contracts, Wil is quite familiar with the need to prioritize the individual state's needs to develop unique and one-of-a-kind recommendations.

### **Notable Accomplishments:**

#### **2020: State of Kansas, Office of Procurement and Contracts (OPC)**

Wil worked with the OPC as a Project Consultant for the Procurement Policy Review project. As a consultant, Wil developed a review of State procurement policies and procedures based on statutes, rules, and circulars. Wil scheduled and conducted several interviews with key stakeholders in State government and served as a point of contact for several agencies that provided input on the project. Ultimately, Wil formed part of the team that drafted the final report for OPC and helped present the key highlights to the client.

#### **2019-2020: State of Hawaii, State Procurement Office (SPO)**

Wil worked with the State Procurement Office as a Project Consultant for the Construction Procurement Policy Review project. As a consultant, Wil was involved in researching and developing a review of State construction procurement policies vis-à-vis the Federal Acquisition Regulations (FAR). Over the course of the project, Wil reviewed hundreds of pages of state documents that outline public procurement policy in Hawaii and scheduled and recorded over 40 interviews with key stakeholders from the public and private sectors, including prime contractors and subcontractors.

#### **2019-Present: State of Indiana, Department of Administration (IDOA)**

Wil is currently a procurement consultant on several projects for the State of Indiana, most notably on the re-procurement of a procurement and travel card program and a rental vehicle program on behalf of state agencies. Additionally, Wil is currently involved as a consultant on more complex IT procurements such as cloud-based contact centers and job scheduling solutions. Wil assists in data analyses for these projects as well as the drafting, evaluating, and awarding of these contracts, which represents millions of dollars from the State's budget.

### **Education:**

B.A. Russian & Eurasian Studies and Political Science, Colgate University

## **Matthew Lewis, Subject Matter Expert**



### **Duties and Responsibilities:**

Matt is a Director with Ikaso. As a Subject Matter Expert, Matt will be an invaluable advisor for the development of key deliverables throughout the engagement. He will participate in the framework development, development of recommendations, and review of the ultimate report.

### **Previous Industry and Related Experience:**

For 15 years Matt has served as an expert in state procurement execution and the design and implementation of programs that comply with complex regulatory schemes while promoting states' interests and fulfilling their needs. He has helped states and municipalities revise their procurement laws, regulations, policies and practices to track national best practices while maintaining awareness of local considerations or constraints. He has helped states design and execute difficult and high-profile procurements with successful outcomes.

Prior to joining Ikaso, Matt practiced law at the firm of Drinker Biddle & Reath LLP in Philadelphia. His practice included the representation of federal contractors and their disputes with subcontractors for the construction of military bases in combat theaters. His practice also included serving State governments through the establishment of compliance programs regarding unclaimed property and escheatment. He is a licensed attorney in Pennsylvania and New Jersey.

### **Notable Accomplishments:**

#### **2017-2018: Arkansas General Assembly Review Subcommittee**

Matt served as the Project Manager for a project commissioned by Arkansas' Legislature to review the laws, regulations, policies, procedures and practices of the state's procurement, contracting and vendor management capabilities. This project, which included interviews of dozens of stakeholders and a review of thousands of pages of written materials, culminated in a comprehensive final report of recommendations. In particular, the project for Arkansas included a complete review of the state's practices related to construction and maintenance of buildings, including the practices by which the state engaged design professionals and bid out projects. Matt remained involved with Arkansas, helping key legislators draft procurement reform bills and attending six hearings to provide expert testimony regarding those bills.

**2005-2008, 2017-Present: State of Indiana, Department of Administration (IDOA)**

Matt served as a consultant to IDOA on a number of projects. Recently, he helped IDOA critically assess and revise its policies for engaging and promoting use of minority, women and veteran owned subcontractors. Matt has also designed and executed a number of critical solicitations, including stored value cards and IT temporary staffing. His work redesigning the state’s hearing aid purchasing system and negotiating best-in-class contracts was featured as a cover story of *Gov Pro* magazine.

**2016-Present: State of Indiana, Family and Social Services Administration (FSSA)**

Matt has served as a procurement consultant to Indiana FSSA, managing the drafting, evaluation, award, and contract negotiations for multiple complex federally regulated procurements in the Medicaid and entitlement program space. The procurements range from electronic health records software for state psychiatric hospitals, Medicaid fraud detection and prevention services, and employment and training services for SNAP and TANF participants.

**Education:**

J.D., James A. Beasley School of Law, Temple University  
 B.A. History, Haverford College

**Erin Kremer, Subject Matter Expert**



**Duties and Responsibilities:**

Erin is a Senior Manager with Ikaso. As a Subject Matter Expert, Erin will assist in reviewing the project deliverables (both for quality and for content) as well as lending her unique perspective on Ikaso’s findings and recommendations.

**Previous Industry and Related Experience:**

Erin is the former Procurement Director for the State of Indiana. She has more than 21 years of experience working in the public sector in roles that span procurement, contracting, contract management, and human resource management. In her many roles within state government, she managed a successful statewide strategic sourcing initiative, directed a team of vendor managers that aggressively and successfully oversaw statewide contracts, implemented two procurement team reorganizations, supported the protest process, and developed protest mitigation strategies.

**Notable Accomplishments:**

**2017-2018: State of Arkansas, Arkansas General Assembly Review Subcommittee** Erin served as a project adviser for Ikaso’s review and revision of the state’s procurement laws,

regulations, policies, practices and procedures. She helped coordinate and conduct numerous stakeholder interviews, reviewed and improved Ikaso's analyses and recommendations, and helped present and testify about our findings.

**2015-2018: State of South Carolina, State Fiscal Accountability Authority (SFAA), Division of Procurement Services (DPS)**

Erin served as a project manager to conduct a procurement laws, regulations, and procedures, and organization review and analysis of DPS. Additionally, she provided procurement expertise for a solicitation to procure spend analysis and strategic sourcing services and conducted a statewide contract review project.

**2011-2016: State of Tennessee, Department of General Services (DGS), Central Procurement Office (CPO)**

Erin served as a consultant supporting the development of new procurement rules and policy, as well as the design and implementation of a new organization structure for the central procurement and real estate management agencies. She provided procurement expertise and project management support for a solicitation to procure a catalog management solution to increase state purchasers' and local governments' access to statewide contracts. She continues to consult on procurement and HR matters with the CPO leadership team.

**2010-Present: State of Indiana, Department of Administration (IDOA)**

Erin serves as project manager to IDOA's procurement division managing the drafting, evaluation, award, and contract negotiations for multiple complex statewide and agency procurements for commodities and services across multiple industries. Additionally, Erin provides strategic consultation and support to the IDOA leadership team including the central procurement directors and managers on multiple topics and issues.

**Education:**

B.S. Business Administration, Miami University, Ohio