

September 30, 2015

Colorado Strategic Action Planning Group on Aging
Mr. James Riesberg, Chair
Ms. Jennifer Schaufele, Vice Chair

Dear Mr. Riesberg and Ms. Schaufele,

Keystone Policy Center (Keystone) is pleased to submit the following proposal to provide project administration services for the Colorado Strategic Action Planning Group on Aging.

Keystone is a non-profit facilitation and mediation organization with 40 years of experience assisting stakeholders in collaboratively addressing agricultural, environmental, education, energy, and health issues. Founded in 1975, Keystone Policy Center inspires leaders to rise above entrenched positions to reach common higher ground. Keystone is a trusted, third-party, non-profit organization that drives actionable, shared solutions to contentious issues. Our independent, collaborative approaches to problem-solving offer a proven blueprint for progress and collective impact. Many organizations and individual practitioners can provide mediation and facilitation services; however, few can match Keystone's unique combination of experience, expertise, and impact.

Keystone has a deep bench of experienced facilitators to assist the Strategic Action Planning Group on Aging with project management services to support the group in creating a state strategy to address the challenges and opportunities presented to aging Coloradans. Our proposed team will include a combination of a senior policy director (Project Administrator/Manager) and associate policy facilitator (Project Assistant) experienced in working on topics related to aging and public health that involve project management, community outreach, and strategic planning.

Keystone has extensive experience in:

- Gathering meaningful feedback from diverse stakeholders to inform strategy, policy, practice, and investments.
- Engaging stakeholder leadership in productive, positive, structured planning process focused on outcomes.
- Conducting assessments to identify key stakeholders and participants to ensure a comprehensive dialogue.
- Using data, information, and input from external and internal stakeholders to develop organizational strategic plans.
- Assisting multi-lateral groups in defining shared objectives, identifying and filling information needs, and building agreement.
- Project management, fundraising, and administration.



KEYSTONE
POLICY CENTER

We look forward for the opportunity to work with the Group on Aging. Please contact me with any questions: meinhold@keystone.org or (970) 513-5805.

Sincerely,

Lorez Meinhold

Lorez Meinhold
Senior Policy Director, Keystone Policy Center
1800 Glenarm Place
Suite 503
Denver, CO 80202

Keystone Headquarters
1628 Sts. John Road
Keystone, CO 80435

Denver
1800 Glenarm
Suite 503
Denver, CO 80202

Washington DC
1730 Rhode Island Ave., NW
Suite 509
Washington DC 20036

970/516-5800
keystone.org

September 30, 2015

Subject: Aging Group Proposal

Dear Selection Committee,

Pivotal Schedule Consulting, LLC (PSC) is pleased to submit our qualifications for Colorado's Aging Group Project. Thank you for taking the time to review our credentials and for the opportunity to become involved in this critical project.

Legislative Declaration has determined that both the United States and Colorado face a historic demographic shift over the next twenty-five years. There will be larger numbers of workers retiring and as longevity increases, there will be an increase in the fifty years of age plus. This increase will be very significant and have different effects on the economics of families, communities, businesses and programs. There is little preparation in place to meet the challenges.

Our team of professionals fully understand the competencies and resources required to overcome these challenges. We also understand how time-sensitive this project is. As detailed in our Statement of Qualifications, we can fulfill the need for a Project Administrator/Manager and Project Assistant as required to move forward with this project.

Anita Kiefer and Megan Martin are prepared to conduct research, analyze data and while collaborating with different groups, develop long-term strategies on various issues affecting state and local government agencies. We understand the criticality and impacts to the families, communities and state infrastructures through experience in the business sector.

PSC welcomes the opportunity to become part of this dynamic team that is moving forward to examine the positive and negative impacts of the aging demographic shift and to help examine government policies, programs and agencies. We are aware this will require thorough literature review of previous age-related studies and recommendations in Colorado as well from other states and countries, in-depth studies and research into what is currently in place, learn what issues have been affecting state and local government agencies due to the demographic shift and work toward actionable recommendation to update the plan.

Our experienced professionals have over 20 years of combined experience providing our clients with professional project management and scheduling services that have assisted their projects in overcoming obstacles and achieving a successful and on time project completion. We

understand that this critical issue is coupled with an aggressive schedule and are committed to providing the resources required for a successful, on time project completion.

What sets our team apart is our extensive schedule management and project management experience. We will utilize this unique experience and software to closely monitor progress, meet deadlines and manage the budget. This approach will provide a baseline for measuring progress and will ensure the project, deliverables and project management team remains on schedule. This solid program analysis is critical to overcoming the challenges associated with managing this project. It also provides the capability to manage multiple activities while ensuring that the committee is on track for the November 2016 final report deadline.

Our approach will include a detailed action plan and scope to move forward, analyzing data, organizing, coordinating, problem solving, critical thinking and working intimately with the planning group, executive members, State and local agencies, sponsors and stakeholders involved in the project. We will manage the program development and execution as well as contract management and quality assurance.

Our experience also includes managing public relations, working with city and state government officials, contractors and consultants, volunteer committees, and local municipalities. We are committed to conducting regular meetings, open communication, and developing the reports necessary to be distributed in a timely manner to the proper personnel. We are receptive to guidance and direction from the planning group and executive committee. Our goal is to meet and exceed all expectations. Our passion for the needs of our aging population as well as addressing economic issues impacting them and the State is at the forefront of our desire to be involved in this project.

We look forward to the opportunity to serve on this important team. If you require any additional information, please do not hesitate to contact Anita Kiefer at (970) 231-4976 or anitakiefer@pivotal scheduling.com.

Sincerely,

Anita M Kiefer

Anita Kiefer
(Project Administrator), Pivotal Schedule Consulting, LLC
Megan Martin
(Project Assistant), Pivotal Schedule Consulting, LLC

PART B: Project Approach

Scope / Objective

With this demographic shift over the next 25 years, the middle class and lower income families will be the most challenged to provide support for aging loved ones which will involve care giving and services needed that will be of financial impact to them. There will be demands on Social Security, Medicare, and Medicaid, housing, transportation and health care. This will be on all levels, local, State and federal. This not only impacts the financial status of the families, but impacts the future State income and sales tax revenues as well as property tax revenues, which directly affects the families.

The scope and objective for this project is to create a state strategy for addressing the many challenges and opportunities that are becoming prevalent with the retirement and aging of the Baby Boom Generation. At this point, the Baby Boom Generation will encompass the over 50 generation. This will increase over time and one of the main objectives of this project is to prepare state and local communities to meet the challenges of this reality. The strategic plan should address many topics such as economics, housing, family care-giving, long term care, work force, transportation, health care, low income families, state programs, state budgets etc.

Purpose

Pivotal Schedule Consulting (PSC) will proactively use critical thinking; analyze all data and use problem solving skills when working with issues, work collaboratively with members, contractors, community leaders, all interested parties, all elected officials, and stakeholders to establish criteria that will support the common goal and group. The team will motivate, mentor and encourage participation through meetings, communication and public input.

PSC is interested in building a team that will be enthusiastic and inspired to find resolutions and solutions that will affect all of us at one time or another. Our passion for people and achievement goes beyond the end of the project and Pivotal Scheduling is prepared to commit to the time and the energy needed to achieve success. Being a diverse organization is an attribute to managing this project.

Deliverables

The project shall conclude with actionable recommendations derived from research of past information, new information data obtained and evaluated, and through public input and involvement. The goal is to present recommendations that will attribute to Colorado legislation and agencies as they prepare to update policies and programs to meet the future challenges.

PSC will prepare a formal Strategic Action Plan detailing all of the work of the Planning Group with its final recommendations on or before November 30, 2016 to the Governor, the General Assembly and any affected state agencies. We will further prepare an oral report to the Joint Budget Committee during the 2016 legislative session as noted in the RFP to summarize the work of the Planning Group and all preliminary findings or recommendations.

Roles and Responsibilities

The initial step for the project team will be to meet with the planning members and the executive committee to discuss expectations and goals. Understanding the goals of the committee and sponsors is imperative to the success of the project and project management. The project team will further interact with the fiscal sponsor on financial and compliance issues so all is understood.

Once the expectations are understood and the goals established, the project team will analyze previous data and studies that have been performed on the topic of Aging in Colorado. The team will evaluate previous analysis and documentation of various reports on this topic. It would behoove the team to further research other states and communities outside of Colorado to evaluate what their approach has been in the past on this topic. This is a federal concern, and not just State and local. The more data and information collected, the more aggressive the team can be in moving forward and not recreating what has already been obtained and utilized.

PSC will coordinate with volunteers and personnel to appropriately distinguish the attributes of each individual that will present the most benefit in accomplishing the end goals. The assembly of these groups or task force teams will be instrumental in a successful project.

Community and public relations will be critical, including a planning group website, and external distribution of information to be managed and coordinated. Understanding the target audience will be critical to ensuring communication methods are appropriate for reaching this audience. This will be especially important once different opportunities and communications are instituted for input from Colorado citizens.

Additionally, a task force will be needed to assist in ensuring all compliance issues are met and all regulations that apply are followed. This committee or sub-committee will be an intricate part of establishing procedures and policies that will be upgraded or proposed for this project. Understanding and interpreting data, public policy and legislative and regulatory processes will be part of the project team's responsibility.

Documentation goals will be to develop effective briefing and communications materials, drafting and providing informational reports, progress reports and data analysis reports as needed. There will be policy development and other written materials to manage. Monthly meetings will be documented and conducted in a professional manner. PSC's proposed project manager, Anita Kiefer and Administrator, Megan Martin are excited to take on the

responsibility for coordinating and developing all necessary reporting and documentation so as to provide for a successfully project.

Project Time Management

A baseline schedule will be created to capture every activity that will be implemented during the project. It will help set up the comprehensive strategic framework that will encompass progress, budget and deadlines. This schedule will be at the heart of the project. It will become a tracking tool as well as a tool to keep all members abreast of where we are on the project, the progress we are making and what the outstanding issues are. It will provide a timeline and as with any large project, it will assist in the development of a comprehensive project plan, and schedule that can assist the project in determining the path forward and identifying impacts along the way.

Project Cost Management

As stated in the RFP, the budget for this project will be managed by the planning group, executive board and the fiscal sponsor on financial issues. The cost of managing the project will be projected with the schedule data and supported by sound documentation and records.

Project Communication Management

Communications management is instrumental to ensure that stakeholders receive the information they need to know at the appropriate time, through the appropriate methods, and at the appropriate level of detail. Managing public relations, a planning group website, and the external distribution of information mentioned in the RFP are critical forms of communication supported by PSC. Building a cohesive team, conducting regular meetings, and open communication for input and dialogue will be encouraged.

PART C: Project Management and Coordination

PSC will provide project management and coordination based on the experience of the team. Quality will be measured on the project in order to ensure that the project deliverables meet a minimum level of quality. Specific measures of quality and progress will be specified through the schedule. That is why the schedule is the strongest and most accurate measure of progress. The collected measures through the schedule activities should provide information on whether the project is meeting its stated objectives. The measures should focus on whether the project is delivering the defined requirements at an acceptable level of quality to the customer. Also the collection of baseline measures at the start of the project provide for all quality measures that will be tracked.

PSC is headquartered in Irving, Texas and has a regional office in Aurora, Colorado. PSC specializes in the delivery of design-build and aggressive schedule construction projects. Project Manager/Scheduler, Anita Kiefer has over 10 years of project management and schedule experience. Ms. Kiefer carries her PMP certification and specializes in project management concepts that will enhance the focus of the project team's direction, and is critical in developing, monitoring and analyzing projects. Anita's extensive experience with developing a baseline of understanding of the scope of a project, inclusive of the deliverables, the necessary actions required to complete the deliverables, and her ability to communicate and ensure a common understanding of the project's scope among all stakeholders will be vital to this project. Anita's background in managing and developing shutdown schedules as they relate to nuclear plants will provide this project with the attention to detail and the time management skills necessary to provide the Colorado Strategic Action Planning Group on Aging with a successful delivery of their goals.

Project Manager/Sr Project Scheduler, Megan Martin has over 12 years of project management and schedule experience in the construction industry with an emphasis on infrastructure projects.

Megan's ability to collaborate with multiple entities has been seen through the completion of several on time and on budget projects. As a project manager Megan has successfully acted as a liaison between both project owner and contractor in the development of the necessary process and procedures for not only completing the projects, but completing them under budget and ahead of schedule. Her role in communicating the key components of the project as they relate to the multiple stakeholders assisted the project team in identifying the concerns to brainstorm solutions in order to successfully provide the best project for all parties. Megan has led several task force teams developing an action plan and schedule so as to employ the proper processes and quality driven projects.

PART D: Appropriate Subject Matter Experience and Expertise

Ms. Kiefer and Ms. Martin are very experienced working with task forces. Communicating with stakeholders has been prevalent in the projects as they have been large in number and a large part of the project. Working collaboratively with partners has contributed to large projects progressing smoothly and successfully.

Ms. Kiefer and Ms. Martin also have a history of working with large volunteer groups. The nature of these groups vary greatly from youth organizations teaching responsibility and promoting growth of these youths to be successful in everyday life, to teaching and

coordinating other adult volunteers to ensure continued development of the youth of Colorado. The history of working with large volunteer groups of Ms. Kiefer and Ms. Martin also extend to the planning of large events such as fundraisers, where the continual coordination and communication with the volunteers and stakeholders has proven to be a resounding success.

We have been in very diverse groups in our careers and in our personal volunteer situations. We both have strong organizational skills and are very detail oriented. We strive to be effective team leaders and communicators. We appreciate the need for quality, process improvement, uniform practices, and strong interpersonal skills. Strong interpersonal skills and the desire to effectively communicate with others is a strength that has helped us with training, motivation, and mentoring. Our passion to work with people has successfully allowed us to set benchmarks and records beyond expectations as a group and as individuals.

PART E: Budget

PSC is pleased to provide this preliminary budget for this project. PSC understands the need to perform work on time and within budget and has the experience necessary to perform the outlined tasks within the timeframes below. As with any project the potential for changes to the plan are inevitable, PSC will work with the Planning Group to ensure that these are identified early so that resources can be applied so as not to adversely affect the budget.

Personnel Costs:

Ms. Kiefer – The expected hours of Ms. Kiefer were calculated with the anticipation of a project duration of 12 months. Based upon this duration it is expected that Ms. Kiefer would extend approximately 525 hours to the project with an estimated 15% of her time dedicated to performing functions as they relate to document control, quality control and progress reporting. Public relations and website development, distributing communications would encompass approximately 25% of her time, and the project management and coordination with all entities will be the focus of her time at approximately 60% of her time. Ms. Kiefer's hourly rate is \$90 per hour for an estimated \$47,250.

Ms. Martin – The expected hours of Ms. Martin were calculated with the anticipation of a project duration of 12 months. Based upon this duration it is expected that Ms. Martin would extend approximately 600 hours to the project with an estimated 55% of her time dedicated to performing functions as they relate to document control, quality control and progress reporting. Public relations and website development, distributing communications would encompass approximately 15% of her time, and the project management and coordination with all entities will encompass approximately 30% of her time. Ms. Martin's hourly rate is \$75 per hour for an estimated \$45,000.

Production of Reports and Materials (Excluding Printing Costs):

PSC has reviewed the requirements for this project and anticipates that the production of reports, web site support, program and software use for producing concise and professional communication for all stakeholders would require an additional \$3,500. PSC's belief is that all other costs, with the exception of printing, will be minimal and can be managed in a fashion to ensure proper budget management.

Fulfillment of All Duties:

PSC anticipates that any additional costs in performing the duties as outlined will be related to travel necessary for the project for items such as monthly meetings, public communication, and miscellaneous trips to gather and produce all data for this project. That estimated cost is \$3,500.

PSC's total preliminary budget for this project is estimated to be \$99,250.

PART F: References

References for Ms. Kiefer

Russell Bowie—13141 Court David, Lusby Md. 20657, Russell.ppii@comcast.net, 410-474-8982—Project Specialist on a large Turbine Project in a Nuclear power plant. Ms. Kiefer coordinated all of the project data, created and managed the risk matrix for the project, building contingencies where needed, procured materials, developed communication tools with other sub-contractors and did project oversight. Once project implementation began, Ms. Kiefer analyzed the project progress in the field, monitoring performance and tasks while maintaining a schedule for tracking. Her attention to detail helped the Project Manager track budget and capture information that saved the project over a million dollars. She kept Senior executives abreast of the project progress and the detail they needed to respond to the owners of the company.

Tom Phelan—412 Murdock Road, Baltimore MD 21212, tphelan.mms@comcast.net, 443-377-4441—Project Specialist / Coordinator on a large Generator Project in the Nuclear industry. Ms. Kiefer carried the same Project management responsibility for this project and performed the same duties with the exception of writing the specification to proceed with the project. The specification detailed the project in its entirety and when presented to General Electric, became a signed contractual agreement. Ms. Kiefer assisted the Project Manager with the Charter, Project Plan and all Project Management Detail. She followed the PMP regulations.

Collin Andersen—Burlington, KS, colander@wcnoc.com, 620-834-8831—Worked for Collin on Strategic Project Controls. Ms Kiefer worked for Mr. Andersen who was a supervisor for a large Strategic Project Controls group. Ms Kiefer assisted in establishing the first Project Management criteria for new PMs coming in. She provided the templates and tools for Project Managers to proceed on their projects and presentations to the Board of Directors. She also assisted with procurement of contractors, materials and support items they needed to proceed.

She was intricate in creating a manual for new PMs and personnel to use upon arrival to a new plant.

References for Ms. Martin

Philip Meaders – Dallas, TX, pmeaders@lan-inc.com, 713-854-8997 – Ms. Martin worked as the contractor's Schedule Manager for \$350 million light rail project with multiple stakeholders. Megan managed and coordinated with multiple disciplines and 3rd parties in developing a schedule to overcome obstacles as well as adhere to jurisdictional requirements. The development and communication of deliverables to stakeholders was key to keeping all stakeholders apprised of the status of the project.

Steve Medina – Fort Worth, TX, steve.medina@kiewit.com, 847-620-9496 – Ms. Martin worked as the District Scheduler under Steve Medina managing a team of schedulers whose responsibility was to report the progress of projects spanning multiple states to all levels of management. The team provided updates to the expected completion, recovery plans if necessary, and all trends, negative or positive so as to enable management to make timely decisions.

Tom Howell – Denver, CO, tom.howell@kiewit.com, - Ms. Martin worked as a sub consultant providing an independent analysis of impacts and potential recovery options for a \$400 million infrastructure project. Ms. Martin provided delay analysis, acceleration and production alternatives, along with documentation to provide to the stakeholders.

PART G: CONFLICT OF INTEREST

Pivotal Schedule Consulting, LLC does not have any conflict of interest that would preclude us from this project.