

**State of Colorado**

**Response for  
Project Administration Services for the  
Colorado Strategic Action Planning  
Group on Aging**

**September 30<sup>th</sup>, 2015  
5:00 p.m. MDT**

*Prepared by:*



## TABLE OF CONTENTS

A. COVER LETTER .....	3
B. PROJECT APPROACH .....	5
UNDERSTANDING THE PROJECT .....	5
PROPOSED PROCESSES .....	6
C. PROJECT MANAGEMENT AND COORDINATION.....	9
APPROACH TO QUALITY CONTROL.....	9
QUALITY CONTROL PROCESS .....	9
D. APPROPRIATE SUBJECT MATTER EXPERIENCE AND EXPERTISE.....	10
1. WORKING WITH A TASK FORCE OR SIMILAR.....	10
2. MANAGING AND COMMUNICATING WITH A VARIETY OF STAKEHOLDERS .....	11
3. DEVELOPING ACTIONABLE PLANS .....	16
4. WORKING INDEPENDENTLY YET COLLABORATIVELY WITH PARTNERS.....	18
5. WORKING ON ISSUES RELATED TO THE WORK OF THE PLANNING GROUP .....	19
ADDITIONAL CAPABILITIES .....	20
TEAM / PERSONNEL QUALIFICATIONS .....	22
E. BUDGET .....	23
F. REFERENCES .....	24
G. CONFLICT OF INTEREST .....	29
APPENDIX A: TEAM RESUMES.....	30
ELI ROSEN .....	30
MARGARET DIOGUARDI .....	33

## a. Cover Letter

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Thank you for the opportunity to submit Rebound Solutions' proposal for Project Administration Services to support the Planning Group. The mission is to create a state strategy for addressing the many challenges and opportunities presented by the retirement and aging of the Baby Boom Generation

Rebound Solutions has extensive experience in supporting major task force and work group initiatives, including the Governor's Office Amendment 64 Task Force, Health Care Policy and Financing and Colorado Department of Public Health and Environment Help Me Grow Work Group and Steering Committee, and the Department of Human Services Regional Center Task Force. In addition, we have just begun facilitation services for the State Innovation Model (SIM) Steering Committee and eight subcommittees created by the Governor's Executive Order B2015-001. While the SIM initiative is funded through federal sources, the Department of Health Care Policy and Financing is administering the project on behalf of the Governor.

In each of these engagements, we not only perform project administration services, but we also perform facilitation and strategic planning.

We believe this engagement must be designed through a deliberate and thoughtful process, involving all applicable stakeholders and ensuring the objectives and timelines are met. On this note, Rebound Solutions has been instrumental in driving significant change within the Colorado public sector and is bringing a highly qualified and capable team to this project. Our team will bring more than their expertise; they will bring their passion for understanding and solving problems facing our community. It is this unique combination of passion and technical competency that clearly differentiates our capabilities. We understand the potential and rapidly expanding need to address the aging demographic shift. We also understand the desired outcomes. This unique perspective allows us to provide the Planning Group with administrative support options that can leverage the efforts and outcomes of this public engagement initiative.

Over the past six years, Rebound Solutions has demonstrated a track record of producing strategies for both the governmental and nonprofit sectors through highly effective stakeholder and community engagement. This includes specific projects where we have created strategies within the human services and homelessness arenas, as well as in health care and other important life segments. We understand how to effectively engage community stakeholders to build strategies and plans that can be implemented. We also understand the complexity within such initiatives and will leverage this expertise to maximize opportunity development for the Planning Group.

In our experience administering and facilitating multiple committee and subcommittee operations, we have observed that latency naturally occurs between various meetings and other parts of the operation. This creates some normal periods of time where having a full time resource may not be the most efficient approach to project administration. The theory is that carrying a full time payroll with periodic down times

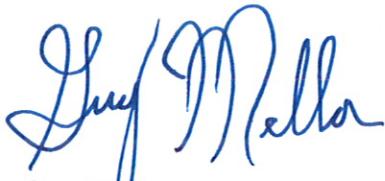
may burn valuable budget resources. The one requirement that needs to survive is that the administrative resource must be available virtually at any time to meet the needs of the Planning Group Executive Committee.

Additionally, from our experience with similar projects, it is necessary to have an individual skilled in marketing and communications as well in project management.

Therefore, Rebound Solutions is proposing an alternative staffing approach to the one set forth in the solicitation. This alternative is very similar to the Project Administrator and Assistant approach, but has the flexibility to respond to the multiple skill levels required in the job duties. We have proposed a Project Administrator who would be engaged part-time and available on short notice for unforeseen needs along with a Marketing and Communications / Project Management Assistant. This would allow the burn rate for the personnel budget to be judiciously utilized. By carefully orchestrating these two roles, we believe the Planning Group can optimize the tight administration budget.

Our approach involves a disciplined milestone tracking methodology for the full life cycle of the project. Through five major processes, initiating, planning, executing, monitoring and controlling, and closing, we create a structure that allows maximum accountability and control while ensuring all stakeholders are effectively engaged.

Thank you for the opportunity to offer our recommendations. We would be pleased to discuss our ideas and your needs in person.



Guy Mellor  
Director of Operations  
Rebound Solutions

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## **b. Project Approach**

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We have provided the Colorado Strategic Action Planning Group on Aging with a highly capable project administration team with Eli Rosen as the Project Administrator and Margaret Dioguardi as the Marketing and Communications / Project Management Assistant. This team is highly effective and can support the Planning Group and relevant stakeholders in successfully providing recommendations to best address the aging demographic shift in Colorado's community. Our approach will be very efficient, highly focused, and intentionally collaborative in working with the Planning Group. Our team will add value by ensuring not only that the project is on schedule and within budget, but also that the quality of the Planning Group's coordination, communication, and recommendation development are of exceptional quality and inclusive of all appropriate parties as identified by the Planning Group and legislature.

Additionally, this team understands special populations as we work with numerous human services organizations that serve unique and oftentimes disadvantaged clients, including the aging population in relation to healthcare, medical research, long-term illness support, and access to quality housing. This team's experience, combined with their effective project management backgrounds, will help the Planning Group succeed in building realistic recommendations and an executable strategic framework to positively address the aging demographic shift in Colorado.

## Understanding the Project

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We understand that our mission is to support the Planning Group in creating a state strategy that addresses the many challenges and opportunities presented by the retirement and aging of the Baby Boom Generation. Rebound Solutions will contract as a Project Administration team to coordinate all of the work of the Planning Group. This Project Administration team will support the Planning Group in achieving its goals and obligations as determined by either the legislation or the Planning Group, which includes coordination to develop and submit the action plan and recommendations. A summary of the Project Administration duties are as follows:

- Take direction from the Planning Group chair and coordinate the work of the Planning Group, a large and diverse volunteer committee, which includes coordinating the following groups:
  - Technical Advisory Committee;
  - Special Purpose Subcommittees to include:
    - Transportation
    - Housing;
    - Workforce Development;
    - Access to Healthcare;
    - Long-Term Care and Other Human Services; and
    - Retirement Security;

- Others as assigned
- Effectively manage communication processes
- Interact with the fiscal sponsor on financial and compliance issues
- Organize, coordinate, and attend all meetings
- Keep minutes and other records
- Coordinate data collection and analysis
- Direct the development, writing, and publishing of any and all reports, including the Planning Group Final Report.
- Submit required progress reports to the Executive Committee

In summary, the overarching objective of the Planning Group is to provide recommendations for a robust and actionable strategy for the aging demographic population of Colorado that addresses the profound implications for relevant sectors of Colorado's economy and society. In order to achieve this objective, the Project Administration Team will work closely with the Planning Group to coordinate relevant stakeholders, manage information, and communicate with transparency and purpose.

## Proposed Processes

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The following illustrates the major processes and steps in the administration process:

### INITIATING

- Project Kickoff
- Document Project scope; objectives, benefits, and constraints; project milestones; main stakeholders and members; project financials; risk identification and mitigation plan; and a communication plan
- Identify and clarify requirements of the Planning Group
- Identify stakeholders outside of the Planning Group
- Identify and clarify requirements of each stakeholder group
- Identify and document the Planning Group's requirements, including those of the Advisory Committee and the Subcommittees
- Identify a contact individual for each stakeholder group

### PLANNING

- Define scope, collect requirements, and develop project plan schedule with executive committee in coordination with and integration of the project plans for each subcommittee
  - Define and sequence activities
  - Estimate activity durations
  - Identify activity dependencies
  - Develop project schedule
  - Develop aligned and integrated subcommittee schedules
- Plan cost management, including an estimate of costs and associated budget
- Plan stakeholder management for each group of stakeholders

- Plan quality management
- Plan Project Administration Team management
- Plan communications management
- Plan risk management
  - Identify risks
  - Plan risk mitigation responses

## **EXECUTING**

- Direct and manage project work to achieve desired outcomes and requirements based on the scope
- Perform quality assurance management
- Manage communications
  - Meeting logistics and meeting management
  - Reporting
  - Website communications
  - Email communications
  - Manage communications amongst stakeholders
- Manage stakeholder engagement
  - Manage stakeholders to produce high quality, comprehensive research and associated recommendation deliverables
  - Provide coordination and project administration services for the following special purpose subcommittees:
    - A. Transportation
    - B. Housing
    - C. Workforce Development
    - D. Access to Health Care
    - E. Long-Term Care and Other Human Services
    - F. Retirement Security
    - G. Advisory Committee
  - Coordinate stakeholder meetings
    - Set agenda
    - Draft and copy materials
    - Send meeting materials, including the agenda, to appropriate stakeholders
    - Draft minutes
    - Ensure action items are clear with responsible individuals, due dates, and status within the minutes
    - Add action items and due dates to the appropriate project action plan or schedule
    - Obtain approval of minutes
    - Communicate minutes as determined in the communication plan, including publishing minutes on the website
- Plan procurement management, as appropriate
  - Coordinate with and integrate the Data Analysis Contractor or other contractors
  - Work with Planning Group to secure additional funding, as appropriate

## **MONITORING AND CONTROLLING**

- Monitor, validate, and control project work within the plan and scope
- Control schedule and monitor schedule performance
  - Provide periodic schedule updates in the Project Status Report that show activities, % complete, estimated and actual start dates, estimated and actual durations, estimated and actual finish dates, and responsible individuals
  - Establish milestone dates to manage timeliness of the project
- Control and monitor costs
  - Provide and monitor periodic actual cost vs. budget report in the Project Status Report
- Provide quality control
- Control communications
- Document risks, perform periodic risk reviews, and update risk mitigation plans if necessary
- Control stakeholder engagement

## **CLOSING**

- Close the initial project phase with each stakeholder group
- Close the initial project phase with the Planning Group
  - Manage phase 1 final report writing, review, and production
  - Deliver final report
  - Coordinate the phase1 final report with the legislature as required

These major project administration processes will require different resource engagement levels throughout the lifecycle of the project with many of the phases and activities occurring simultaneously. The project plan developed in the Planning process will consider the project activity relationships and dependencies to build in the interactions among the activities. Depending on the Planning Group's preferences, the project plan may be built in the form of a Work Breakdown Structure (WBS) to outline the parent-child relationships of the processes and activities, while also including dependencies and precursors.

## **c. Project Management and Coordination**

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### **Approach to Quality Control**

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The Project Administration team will monitor the time and budget milestones through a periodic “Project Status Report.” Subcommittees will forward their status reports to the Project Administrator who will consolidate them into one summary report for the Planning Group.

Risks, issues, and mitigation plans will be identified and monitored throughout the life cycle of the Planning Group. Status levels of Green, Yellow, and Red will be defined for each work group and the Project Administration team will compile them into one dashboard for the Planning Group to monitor.

### **Quality Control Process**

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When plans or portions of a plan are projected to go into a yellow or red status, the specific issues will be elevated to the Planning Group with a description of the situation, estimated impacts, and recommendations for how to address the issue. A project should never go from a green status directly into a red status.

In order to perform such a comprehensive and proactive quality control process, it is imperative that all major milestones of major activities first be developed into a plan for the year. Without such a plan, it will be difficult if not impossible to define when a portion or all of a project is going into yellow or red status.

Both the **milestone completion dates** and **budget** will be projected and compared to actuals using this process. The status of the quality control process will be reported in the Project Status Report, as well as in circumstances requiring elevation.

## **d. Appropriate Subject Matter Experience and Expertise**

### **1. Working with a task force or similar**

Rebound Solutions has extensive task force and work group experience. Specifically, we facilitated the Amendment 64 Marijuana Task Force, created to coordinate and build a regulatory structure that promotes the health and safety of the people of Colorado. The task force members and the interests they represented are identified below.

#### **Task Force Members**

Name	Affiliation	Interests Represented
Jack Finlaw, Co-Chair	Office of the Governor, Chief Legal Counsel	Office of the Governor
Barbara Brohl, Co-Chair	Colorado Department of Revenue, Executive Director	Colorado Department of Revenue
Larry Abrahamson	Colorado District Attorneys' Council	District Attorneys
Kristal L. Bernert	KLB Services, LLC	At-large Task Force Member, resident of the Denver-metro area
Eric Bergman	Colorado Counties Inc.	Local Government
David Blake	Attorney General's Office, Deputy Attorney General for Legal Policy and Governmental Affairs	Attorney General's Office
Kevin Bommer	Colorado Municipal League	Local Government
Ron Carleton	Colorado Department of Agriculture, Deputy Commissioner	Agriculture
Mike Cerbo	AFL-CIO	Colorado Employees
Brian Connors	Office of the Colorado State Public Defender, Chief Deputy Public Defender	Public Defenders
Charles Garcia	Colorado Criminal and Juvenile Justice Commission (CCJJ)	CCJJ
John Jackson	Greenwood Village, Police Chief	Law Enforcement
Senator Cheri Jahn	State Senator	Colorado General Assembly
Dr. Sam Kamin	University of Denver, Law Professor	Legal expertise
Ron Kammerzell	Colorado Department of Revenue	Enforcement, including MMED
Senator Vicki Marble	State Senator Appointed by Senate Minority Leader	Colorado General Assembly
Representative Dan Nordberg	State Legislator Appointed by House Minority Leader	Colorado General Assembly

## 2. Managing and communicating with a variety of stakeholders

As part of the Amendment 64 Marijuana Task Force, Rebound Solutions managed the communication with and coordination of a variety of stakeholders, including the following five Work Groups:

### **Regulatory Framework Working Group**

<b>Name</b>	<b>Affiliation</b>	<b>Interests Represented</b>
Ron Kammerzell - Co-Chair and Task Force Member	Colorado Department of Revenue	Enforcement, including MMED
Representative Dan Pabon, Co-Chair and Task Force Member	State House Representative	Colorado General Assembly
David Blake, Task Force Member	Attorney General's Office	Attorney General's Office
Dr. Sam Kamin, Task Force Member	University of Denver, Law Professor	Legal expertise
Meg Sanders, Task Force Member	Medical marijuana industry	Medical marijuana industry
Betty Aldworth	Self-employed	Amendment 64 Campaign
Norton Arbelaez	RiverRock LLC, Compliance Officer	Medical marijuana industry
Donald Burmania	Colorado Department of Revenue	Liquor Enforcement
Robert Dill	Attorney	Experience in medical marijuana law
Laura Harris	Colorado Department of Revenue	MMED Enforcement
Cally King	Governor's Office	Governor's Office
Dr. Jeremy Nemeth	University of Colorado Denver, Assistant Professor, Planning and Design	Policy expertise
Chris Nevitt	Denver City Councilman	Local Government
James Shpall	Applejack Associates, President	Alcohol industry
Mary Beth Susman	Denver City Council, President	Local Government

## Local Authority and Control Working Group

Name	Affiliation	Interests Represented
Kevin Bommer, Co-Chair and Task Force Member	Colorado Municipal League	Local Government
Eric Bergman, Co-Chair and Task Force Member	Colorado Counties Inc.	Local Government
Senator Vicki Marble, Task Force Member	State Senator Appointed by Senate Minority Leader	Colorado General Assembly
David Baumgarten	Gunnison County Attorney	Local Government
Wayne Cauthen	Citizen	Citizen concerned with local government impact
Gina Fenton-Carbone	Citizen	Citizen concerned with youth impact
Mishawn Cook	City of Boulder, Tax & License Manager	Local Government
Tom Downey	Denver Division of Excise & License, Director	Local Government
James Eklund	Governor's Office of Legal Counsel, Senior Deputy Legal Counsel	Governor's Office
Lew Gaiter	Larimer County Commissioner	Local Government
Cheri Hackett	Cannabis Trade for Colorado	Medical marijuana industry
Andy Hill	Colorado Department of Local Affairs (DOLA), Community Development Office	DOLA
Wanda James	Simply Pure	Medical marijuana industry
Harris Kenny	Reason Foundation, Policy Analyst	Policy Interests
Lewis Koski	Colorado Department of Revenue, Medical Marijuana Enforcement Division (MMED)	MMED
Adam Paul	Lakewood City Councilman	Local Government
Mike Rozicki	San Miguel County Planning Director	Local Government
Bryan Treu	Eagle County Attorney	Local Government
Jason Warf	Colorado Springs Medical Cannabis Council	Marijuana consumers

## Tax, Funding and Civil Law Working Group

Name	Affiliation	Interests Represented
David Blake, Co-Chair and Task Force Member	Attorney General's Office, Deputy Attorney General for Legal Policy and Governmental Affairs	Attorney General's Office
Senator Cheri Jahn, Co-Chair and Task Force Member	State Senator	Colorado General Assembly
Kristal L. Bernert, JD, CPA, Task Force Member	KLB Services, LLC	At-large Task Force Member, resident of the Denver-metro area
Mike Cerbo, Task Force Member	AFL-CIO	Colorado Employees
Tamra Ward, Task Force Member	Colorado Concern	Colorado Business Community
Bill Callison	Faegre, Baker, Daniels LLP, Attorney	Tax and corporate law
Don Childears	Colorado Bankers Association	Banking industry
Michael Elliott	Medical Marijuana Industry Group, Executive Director	Medical marijuana industry
Dorinda Floyd	Colorado Department of Revenue, CFO	Colorado Department of Revenue
Holli Hartman	Baker & Hosteller LLP, Attorney	Employee law
Dan Krug	Office of State Planning and Budget (OSPB)	OSPB
Mary Jo McGuire	Conspire2Hire, Compliance Director	Drug and alcohol testing
Adrienne Russman	Governor's Office	Governor's Office
Kimberlie Ryan	Ryan Law Firm, LLC, Attorney	Civil Rights Employment Law/Employee Rights
Alexis Senger	Office of State Planning and Budget (OSPB)	OSPB
John Vecchiarelli	Colorado Department of Revenue	Tax administration

## Consumer Safety and Social Issues Working Group

Name	Affiliation	Interests Represented
Dr. Chris Urbina, Co-Chair and Task Force Member	Colorado Department of Public Health & Environment (CDPHE)	CDPHE
Christian Sederberg, Co-Chair and Task Force Member	Amendment 64 Campaign	Amendment 64 Campaign
Ron Carleton, Task Force Member	Colorado Department of Agriculture, Deputy Commissioner	Agriculture
Craig Small, Task Force Member	Marijuana consumers	Marijuana consumers
Dr. Christian Thurstone, Task Force Member	University of Colorado Denver and Denver Health, Child Psychiatrist	Physician with addictions treatment experience
Ian Barringer	Rm3 Labs Colorado LLC, President	Medical marijuana industry, testing labs
Dr. Laura Borgelt	University of Colorado, Assoc. Professor, Pharmacy	Pharmacy and family medicine
Frank Cornelius	Behavioral Healthcare Council	Treatment provider
Kenneth Finn	Springs Rehabilitation, PC	Medicine
Kevin Fisher	RK Enterprises, Owner	Industry
Dr. Kari Franson	University of Colorado, Associate Dean, Pharmacy	Pharmacy
Brandon Friede	Governor's Office	Governor's Office
Laura Harris	Colorado Department of Revenue, MMED	MMED
Ashley Kasprzak	Team Fort Collins, Executive Director	Concerned with youth impact
Aaron Kennedy	State of Colorado, Chief Marketing Officer	Advertising Specialist
Lisa Morzel	Boulder City Council Member	Local Government
Wade Troxell	Fort Collins City Councilman	Local Government
Chris Wiant	Care Colorado	Care Colorado
Katharine (Jade) Woodard	Alliance for Drug Endangered Children	Concerned with youth impact

### Criminal Law Working Group

Name	Affiliation	Interests Represented
John Jackson, Co-Chair and Task Force Member	Greenwood Village, Police Chief	Law Enforcement
Brian Connors, Co-Chair and Task Force Member	Office of the Colorado State Public Defender, Chief Deputy Public Defender	Public Defenders
Larry Abrahamson, Task Force Member	Colorado District Attorneys' Council	District Attorneys
Charles Garcia, Task Force Member	Colorado Criminal and Juvenile Justice Commission (CCJJ)	CCJJ
Representative Dan Nordberg, Task Force Member	State Legislator Appointed by House Minority Leader	Colorado General Assembly
David Blair	Denver Family Therapy, Director	Social workers
Lauren Davis	Hoban & Feola LLC, Attorney	Marijuana consumers
Stephanie Donner	Governor's Office of Legal Counsel, Senior Deputy Legal Counsel	Governor's Office
Darrell Lingk	CDOT Highway Safety Office, Director	CDOT
Genifer Murray	CannLabs	Medical marijuana industry, testing labs
Rachel O'Bryan	Attorney, self-employed	Concerned with youth impact
J. Grayson Robinson	Arapahoe County Sheriff	Law enforcement
Marco Vasquez	Colorado Department of Revenue, MMED	MMED
Ed Wood	Retired	DUID interest

### 3. Developing actionable plans

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As part of the facilitation of the Help Me Grow Project, sponsored by Health Care and Financing and the Colorado Department of Public Health and Environment, Rebound Solutions not only facilitated the Work Group's meetings, but also led the team in developing its strategy, requirements, and actionable plans for the proposed new service. Rebound Solutions also provided progress reports and sought stakeholder input through the Steering Committee as outlined in the following:



## **CONTACT CENTER WORK GROUP STEERING COMMITTEE MEETING JANUARY 6<sup>TH</sup>, 2015**

## **WORK GROUP PROGRESS REPORT**



## APPROACH

Meeting 1 (Why?)	Meetings 2, 3 and 4 (What?)	Meeting 5 (How?)	Meeting 6 (How?)
<b>Intention</b>  Why are we here?  What is the problem we are trying to solve?  <u>Key Outcome:</u> Understand our purpose and approach	<b>Capabilities</b>  What are others doing?  What is required to solve the problem?	<b>Context</b>  What technical tools do we need?  What are the implementation options?	<b>Implementation</b>  How can we fund the project?  How do we implement the solution?
	<b>Key Outcome:</b> Requirements	<b>Key Outcome:</b> Implementation Models	<b>Key Outcome:</b> Recommendations



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## RECOMMENDATIONS REPORT (END OF PROJECT)

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- Summary of 6 work group sessions (approach used) and significant discussions and decisions
- Detailed requirements and priorities (scope and phasing)
- Implementation models
- Governance structures
- Funding options
- Work Group Recommendations



12



### 4. Working independently yet collaboratively with partners

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Part of Rebound Solutions' assignment was to coordinate the various stakeholder and partner communication process. The following is a quote from the Help Me Grow (HMG) phase 2 final report that describes our work:

"Under a private grant from the Connecticut Children's Medical Center, Colorado was provided funding to develop a technology plan for how Colorado can integrate information, resources, and referrals into a coordinated and cohesive system, which has been referred to as Help Me Grow. Providing a consolidated approach for supporting families and children across Colorado has been a high priority in the past year and now this grant allows the state to produce a viable plan for realizing the potential of optimizing existing customer support channels and resources. As part of this effort, Rebound Solutions completed a Technology Implementation Plan on December 31st, 2012 that outlined options for implementing this essential service for Colorado's families."

Through this work, Rebound Solutions provided implementation support by facilitating and coordinating meetings, leading to the development of a set of recommendations on the structure and function of the contact center component of Help Me Grow. During the planning process, Rebound Solutions provided the following services: 1) facilitated/supported six meetings of the Contact Center Work Group; and 2) provided technical support and research.

The HMG-H Contact Center Work Group included the following partners:

Partner	Organization
Andrea Jenkins	Kit Carson County Health Dept.
Anna Jennett	CDPHE
Anne-Marie Braga	CDPHE
Ayelet Talmi	Children's Hospital
Mark Kling	Family Resource Center Association
Mandy Bakulski	CDPHE
Kelly Galloway	Children's Hospital Care Coordination
Gina Robinson	HCPF
Jenne Loffer	United Way of Larimer County
Lisa Franklin	Parent 2 Parent
Taran Schneider	Qualistar
Elaina Hockaday	Maximus
Ileana Perez	Family Voices
Dina Castro	Family Voices
Tom Rose	Family Voices
Gloria DeLoach	Family Leader and Denver Health
Jennifer Richardson	Families First
Matthew Hebard	CDHS (OEC)
Sarah Mathew	CDE
Stephanie Sanchez	Mile High United Way
Christie Higgins	Western Colorado 211

## 5. Working on issues related to the work of the Planning Group

Across the various task force and work group projects that Rebound Solutions has experienced, the issues faced by each team have been similar. Although the specific subject matter varies between each engagement, typical issues that the Planning Group will likely face include:

- a. Coordinating the diverse backgrounds, interests, and scheduling of the Planning Group members
- b. Organizing Planning Group processes such as communications both internal and external to the group

- c. Motivating subcommittees to partner with the Planning Group to get the work done
- d. Developing a comprehensive work plan to achieve the goals set forth in legislation
- e. Performing data analysis needed in the research and drafting of the final report
- f. Interpreting various provisions in the legislation in order to create actionable plans
- g. Fairly, but proactively balancing multiple interests and sometimes inconsistent or unavailable data to create a final report that will resonate with the legislature, stakeholders, and the public in general.

The key to achieving success in these endeavors is to partner with individuals and organizations who have previously been through these types of government operations. Rebound Solutions is one of those organizations who can make a significant difference in the Planning Group's outcomes by working behind the scenes to support the administration required to succeed.

### Additional Capabilities

In terms of general capabilities, the following table outlines clients Rebound Solutions has served in the past six years. We have listed our project management expertise in the first column.

Our Customers	Program Management	Human Service Specific, including areas related to Aging populations	Public Stakeholder Engagement, Surveying, Analysis, and Reporting	Facilitation	Strategic Planning	Change Management	Coaching and Leadership Development
Colorado Department of Human Services	✓	✓	✓		✓		
Boulder Shelter for the Homeless	✓	✓	✓	✓	✓		
Denver's Road Home	✓	✓	✓	✓	✓		
Urban Peak		✓	✓	✓	✓		
Arapahoe House		✓	✓	✓	✓		
Mile High United Way	✓	✓	✓	✓	✓	✓	✓

Our Customers	Program Management	Human Service Specific, including areas related to Aging populations	Public Stakeholder Engagement, Surveying, Analysis, and Reporting	Facilitation	Strategic Planning	Change Management	Coaching and Leadership Development
Colorado Department of Public Health & Environment, Prevention Services Division	✓	✓	✓				
Colorado Medical Society	✓	✓	✓				
We Don't Waste		✓	✓	✓	✓		
The Denver Foundation	✓	✓	✓	✓	✓	✓	✓
Street Fraternity		✓	✓	✓	✓		
Colorado Children's Campaign	✓	✓		✓	✓		
Colorado Lt. Governor's Office	✓	✓		✓	✓		
Colorado Office of Early Childhood	✓	✓	✓	✓	✓		
Colorado Charter School Institute				✓	✓		
Colorado Department of Education				✓	✓		
Colorado Legacy Foundation	✓		✓		✓		
Colorado Department of Public Safety	✓		✓		✓		
The Colorado Health Foundation	✓	✓	✓	✓	✓		
Colorado Department of State	✓		✓	✓	✓		
9Health Fair		✓		✓	✓		
Colorado Governor's Office of Information Technology	✓	✓	✓	✓	✓		
Statewide Internet Portal Authority	✓	✓	✓	✓	✓		
Kaiser Permanente	✓				✓	✓	✓
City and County of Denver Office of Children's Affairs	✓	✓			✓		
California Department of Human Services		✓			✓		
Colorado State Land Board	✓		✓		✓		
Colorado Department of Labor and Employment	✓		✓		✓		
State of Pennsylvania		✓	✓		✓		

## Team / Personnel Qualifications

We have assembled a team that has deep expertise in public and nonprofit sector human services' organizations and programming, including initiatives that support over-50 age individuals. This experience includes working with Kaiser Permanente, Project Angel Heart, Habitat for Humanity, the Colorado Department of Public Health & Environment- Prevention Services Division, the Colorado Medical Society, and Phoenix Multisport to provide project management, strategic planning, change management, facilitation, and/or public engagement expertise. Each team member's resume can be found in Appendix A.

Resource	Project Role	Summary of Qualifications
Eli Rosen	Project Administrator	With strong roots in social justice, Eli's passion for the welfare of the Denver community has played a profound role in his professional and personal life. Through spearheading philanthropic events and founding a nonprofit organization, Eli has groomed his skills in project management and coordination of resources and personnel. From his work in the education and legal sectors, Eli recognizes and practices the value of synthesizing data into its most compelling and effective form for change. Working as a City Year AmeriCorps Member, Eli honed his cross-cultural communication skills while working with diverse stakeholder groups of students, teachers, and community members. Whether he is tutoring students in an underserved community or organizing philanthropic events, Eli has always relied on collaboration in order to achieve the highest-level results.
Margaret Dioguardi	Marketing and Communications / Project Management Assistant	Margaret Dioguardi brings over 20 years of experience with a varied background in project management, marketing and communications across a range of industries such as employee benefits, publishing, event planning and health care. Whether implementing a new program or a new position within an organization, Margaret works to bring diverse stakeholders, with sometimes divergent objectives together to develop creative solutions to achieve desired outcomes and deliverables. Margaret holds a BA degree from Marquette University.

## e. Budget

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The following is the cost budget breakdown by resource of the administration project team for fulfillment of all the duties and responsibilities as outlined in the solicitation:

Resource	Hourly Rate	Estimated Hours <sup>1</sup>	Project Cost
Project Administrator <sup>2</sup>	\$60	1127	\$67,620
Marketing and Communications / Project Management Assistant <sup>3</sup>	\$70	451	\$31,570
Report Production or Materials Costs <sup>4</sup>			\$280
Travel Costs <sup>5</sup>			\$0
<b>Total</b>		<b>1578</b>	<b>\$99,470</b>

Footnotes:

<sup>1</sup> The Estimated Hours are based on 13 months, assuming the project starts by December 1, 2015 and ends December 31, 2016

<sup>2</sup> The Project Administrator is budgeted at .5 FTE for 13 months. Based on the requirements outlined, this resource will not be needed full-time throughout the duration of the project, but will be available when needed and will be efficient and effective in the project administration delivery. This provides the best value and will prevent burning valuable budget resources during times of lower resource need.

<sup>3</sup> The Marketing and Communications / Project Management Assistant is budgeted at .2 FTE for 13 months. This individual, Margaret Dioguardi, is a higher skill-level resource and will provide subject matter expertise over the project for the Project Administrator. Utilizing the mix of the Project Administrator and a more senior resource will provide an optimal value within the schedule and budget allocated.

<sup>4</sup> This includes a material cost for easel pads for each subcommittee and the Planning Group (8 committees \* \$35/easel pads) = \$280 material cost

<sup>5</sup> Travel costs have not been included for this engagement since the efforts are local and the proposed project team will be available both in-person locally and virtually. Specific travel requirements were not identified in the solicitation.

We will complete this engagement for a fixed price of \$99,470. This includes all administrative service costs, as well as costs associated with meeting support. We will invoice the Department of Local Affairs (DOLA) on a monthly basis in equal amounts based on the project start date and a project end date of December 31, 2016. This monthly invoice amount will be calculated and agreed upon when a project start date is formalized.

## f. References

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We have provided the following qualifications that are specific to the solicitation. They each showcase our project management and stakeholder engagement capabilities.

### Amendment 64 Taskforce Facilitation

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**Client Name:** Governor's Office

**Project:** Amendment 64 Taskforce Facilitation and Report

**Contact:** Jack Finlaw

Chief Legal Council

(303) 866-6375

**Dates of Service:** January 2012 to May 2012

#### Relevant Strengths and Experience:

1. Working with a task force or similar	✓
2. Managing and communicating with a variety of stakeholders	✓
3. Developing actionable plans	✓
4. Working independently yet collaboratively with partners	✓
5. Working on issues related to the work of the Planning Group	✓

### The Project Scope

Colorado was one of two states where voters passed the legalization of recreational marijuana by passing Amendment 64. This amendment had specific timelines for delivery of recommendations and rules which the Department of Revenue and the Governor's Office had to comply. A taskforce of approximately 30 members was assembled representing diverse interests, ranging from law enforcement to the marijuana industry. Rebound Solutions was selected to facilitate the taskforce and produce the report.

### The Approach

First, we established clear guidelines for the recommendations and also produced recommendation templates. We structured the taskforce by subcommittees that produced recommendations for consideration by the larger taskforce. By working with the co-chairs, we facilitated the taskforce through over 120 recommendations. We produced detailed content, validated the recommendations, and worked to ensure the recommendations were tracked and recorded. In the end, we produced a highly effective facilitated environment that resulted in the approval of approximately 90 recommendations.

## The Results

Within the three month timeline, we produced a 100 page report that outlined the methodology and described the recommendations in depth. The report served as the guideline for the omnibus legislation that was passed by the state legislature in June 2013

### Colorado Help Me Grow Program Feasibility and Alternatives Development

**Client Name:** Colorado Department of Public Health & Environment  
**Project:** Help Me Grow  
**Contact:** Karen Trierweiler, MS, CNM, Deputy Division Director  
Colorado Department of Public Health & Environment  
4300 Cherry Creek Drive South  
Denver, CO 80246  
[Karen.trierweiler@state.co.us](mailto:Karen.trierweiler@state.co.us)  
303 692-2481

**Dates of Service:** January 2015 to May 2015

#### **Relevant Strengths and Experience:**

Working with a task force or similar	✓
Managing and communicating with a variety of stakeholders	✓
Developing actionable plans	✓
Working independently yet collaboratively with partners	✓
Working on issues related to the work of the Planning Group	✓

**The Project Scope:** The Help Me Grow (HMG) program is a national endeavor. The Colorado HMG will create an integrated identification, referral, and follow-up system, including enhanced support and assistance based on need, for families, providers, and programs that will improve accessibility to existing physical, oral, and behavioral health, educational, and developmental resources.

Historically, Help Me Grow programs in other states are focused on early childhood, but through discussions, stakeholders believed that in Colorado's implementation, the target population should be expanded to meet the needs of more families. Therefore, the target population is prenatal women, children and youth 0-21 and their families.

The work that occurred in 2014 and 2015 was focused more on developing implementation recommendations and presenting a clear understanding of why bringing

Help Me Grow to Colorado would improve the lives of children and families. In order to do this, the Contact Center workgroup and the Steering Committee met monthly or bi-weekly over the course of seven months and discussed the implementation of Help Me Grow in Colorado. The basic premise of this work was a focus on backwards planning. The HMG Stakeholder Group consisted of over 100 interested individuals who attended meetings at the launch and wrap-up of the work.

Rebound Solutions provided implementation support by facilitating and coordinating meetings leading to the development of a set of recommendations on the structure and function of the contact center component of Help Me Grow. Rebound Solutions also provided technical support and research.

**The Approach:** Rebound Solutions facilitated five Work Group sessions ranging from understanding the problem to requirements gathering to implementation planning alternatives.

#### **The Results:**

Rebound Solutions produced a comprehensive final report outlining alternatives for implementation for consideration from 3 department executive directors, CDPHE, HCPF and CDHS.

## Colorado Benefits Management System (CBMS) Transition and Program Management

**Client Name:** **Colorado Office of Information Technology**

**Project:** **Colorado Benefits Management System (CBMS) Transition and Program Management**

**Contact:** Michael Locatis, Former Colorado Chief Information Officer (CIO)  
Colorado Department of Public Safety  
601 East 18th Avenue, Suite 250  
Denver, CO 80203  
  
Michael.Locatis@hq.doe.gov  
  
202-586-0166

**Dates of Service:** CBMS Transition: December 2008 – April 2009  
CBMS Director: June 2009 – March 2010

### **Relevant Strengths and Experience:**

6. Working with a task force or similar	✓
7. Managing and communicating with a variety of stakeholders	✓
8. Developing actionable plans	✓
9. Working independently yet collaboratively with partners	✓
10. Working on issues related to the work of the Planning Group	✓

### **The Project Scope**

In December 2008, Rebound Solutions was contracted by the Governor's Office of Information Technology (OIT) to manage the transition of CBMS from the incumbent vendor (HP/EDS) to the new vendor (Deloitte Consulting). This required a significant change management plan to address adoption by the new vendor while safely securing an operational transition without impacting business operations. Secondly, Rebound Solutions was selected from a competitive bid and served ten (10) months as the Interim Director for the CBMS program. In addition, the organizational structure, business processes, release management priorities, and overall strategic plan were not clearly defined for the program. Rebound first had to set the strategic direction for the organization and establish a clear change management approach to support this strategic plan.

### **The Approach**

Working effectively with senior OIT, CDHS, and HCPF leadership, Rebound Solutions established a new governance model to build consensus around the strategic priorities

of the program. Our team concurrently produced a strategic plan that aligned internal and vendor staff to best meet the near term operational objectives, which were primarily focused on implementing overdue functional changes. Key change management activities included building a senior leadership team comprised of OIT, CDHS, HCPF and County leadership, building a monthly release plan for the organization, implementing new release business processes, initiating key strategic programs and objectives, and implementing a new communications strategy for the organization. The communications strategy focused on improving transparency to the program, engaging the counties as partners, and providing more information to the internal team. **The**

## **Results**

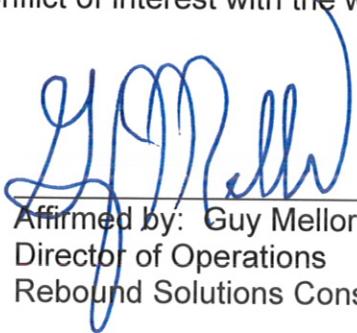
Rebound Solutions managed a highly successful transition between HP and Deloitte without any operational impacts. The team was prepared to assume new operational roles and responsibilities. As Interim Director, the business process engineering effort resulted in more functional program improvements to CBMS than had been accomplished in the previous three years, including:

- The Program Eligibility and Application Kit (PEAK) self-service web site was implemented and allowed clients to check their benefits and perform an eligibility screening online. PEAK Phase 1 was successfully released in October 2009 and PEAK Phase 2 development was completed in January 2010. The fully-implemented PEAK will allow clients to conduct screenings for eligibility, check their benefits, make changes to their information, and apply for benefits.
- The team delivered Phase 1 requirements and design for the CBMS web program to improve the functional CBMS interface. This was delivered on time and with county caseworker support. Rebound Solutions produced the business case outlining future cost savings for the program and was essential in the launch of the Phase 2 Intelligent Data Entry (IDE) program.
- Critical key internal business processes, including change management, requirements validation, and quality assurance were implemented and resulted in over 80 enhancements during the project.

**g. Conflict of Interest**

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As Director of Operations, Rebound Solutions, I confirm that neither me, Rebound Solutions, nor any other potential sub-consultants has any conflicts of interest. We have no entities with which we have relationships that create, or appear to create, a conflict of interest with the work that is contemplated in this solicitation.



Affirmed by: Guy Mellor  
Director of Operations  
Rebound Solutions Consulting Corp.

September 30, 2015

## **Appendix A: Team Resumes**

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### **Eli Rosen**

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#### **Executive Summary**

With strong roots in social justice, Eli's passion for the welfare of the Denver community has played a profound role in his professional and personal life. Through spearheading philanthropic events and founding a nonprofit organization, Eli has groomed his skills in project management and coordination of resources and personnel. From his work in the education and legal sectors, Eli recognizes and practices the value of synthesizing data into its most compelling and effective form for change. Working as a City Year AmeriCorps Member, Eli honed his cross-cultural communication skills while working with diverse stakeholder groups of students, teachers, and community members. Whether he is tutoring students in an underserved community or organizing philanthropic events, Eli has always relied on collaboration in order to achieve the highest-level results.

#### **Employment History**

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Rebound Solutions	August 2015 to Today
City Year Denver	July 2014-June 2013
Udall for Colorado	March 2014-June 2014
Denver District Attorney	June 2013-September 201
Pellino, Rosen, & Mowris S.C.	June 2010-August 2012
Camp Interlaken JCC	Summers of 2009, 2010, 2011

#### **Work Experience**

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##### **Rebound Solutions (August 2015 to Present)**

Eli supports a wide variety of client engagements at Rebound Solutions, including, but not limited to, project/program management, facilitation, analysis, strategy development, and grant writing. Eli proactively coordinates, organizes, and prepares client engagement meetings for success, being inclusive and mindful of all participants, budget constraints, and schedules to manage logistics and optimize productivity.

While supporting facilitations, retreats, and meetings, Eli's detail-oriented focus amplifies comprehension, transparent communication, and analysis among stakeholders through detailed minutes, synthesized summaries and analysis, and clear, digestible reporting and distribution to all relevant individuals or groups. Eli leads research development for a variety of nonprofit and public sector clients in order to understand the current state, as well as potential risks and opportunities. Eli effectively communicates and shares his findings with the engagement team through structured synthesis and analysis of the data, which establishes a baseline assessment and enhances the development of strategies and creative solutions for client success.

### **City Year Denver (July 2014-June 2015)**

Eli was accepted into the highly selective AmeriCorps program to dedicate one year of service to a low-income elementary school, working with over 200 students (97% of whom qualified for free/reduced lunch). Eli led an initiative to increase student attendance, managing the project from data collection through to action planning, execution, and post-initiative analysis. Eli collected, tracked, and evaluated school, class, and individual student attendance data in order to identify attendance trends. These results were distributed and presented to the school administration. Based on the student trends identified, Eli developed, coordinated, and executed monthly initiatives focused on increasing student attendance through creative, engaging activities and presentations. Additionally, after researching best practices and planning, Eli taught 900 minutes of independent literacy and math interventions, resulting in students increasing their reading and math levels by 1.5 years through differentiated curriculum-based lesson plans.

### **Mustache Bash Philanthropy Event (2011-2014)**

Eli coordinated philanthropic events that raised \$25,000, annually, for the National Sports Center of the Disabled. Through collaboration with his team, Eli prepared and monitored a financial plan, taking into account the viability of ticket sales, tax exemptions, and other liabilities. Working with various vendors, artists, venues, and university leadership and students, Eli organized and managed contractual agreements in order to be in compliance with an array of regulations. Eli coordinated 65 individuals to sell 2,000 tickets, while assuring financial accountability and event management.

### **Udall for Colorado (2014)**

Udall for Colorado is a campaign for the senatorial race for the United States Senate, representing Colorado. Eli conducted data analysis of acclaimed attendance, actual attendance, and projected attendance of campaign events. Eli presented the results to the campaign managers in terms of trends according to the demographics of supporters, along with a detailed outline of how to best retain supporters. Supervising a group of volunteers, Eli coordinated and delegated tasks regarding communication to current supporters and potential supporters for upcoming events.

### **Denver District Attorney- Economic Crime Unit (2013)**

While at the Denver District Attorney's Office, Eli assisted attorneys, the operational supervisor, and other legal staff with project management, suspect research, and administrative tasks. Eli was responsible for assuring quality and proper writing etiquette in briefs, motions, and appeals. During high profile cases, Eli helped manage the public relations with media sources by drafting official statements and coordinating press conferences.

### **Pellino, Rosen, & Mowris S.C. (2010-2012)**

Eli supported attorneys in organizing case materials, conducting research, and corresponding with clients and visitors. In preparation and during court, Eli was responsible for the organization of briefs, motions, and other procedural documents.

### **Camp Interlaken JCC (2009-2011)**

Eli planned and delegated tasks to five (5) staff members for camper activities, differentiating for different learning, developmental, and social needs. While prioritizing camper safety, Eli evaluated staff competency to operate motorboats, and conducted trainings for new staff while in compliance with safety regulations.

### **Education**

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- BA Sociology, University of Denver
  - Selected as Member of National Society of Colligate Scholars

### **Community Involvement**

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- Reading Partners Volunteer Tutor (2015)
- President of Sociology Club at the University of Denver (2013-2014)
- Shawco Tutor and Volunteer (2012)
- Bridge Project Tutor (2011-2012)
- President of Club Lacrosse at the University of Denver (2010-2012)
- Founder of Sports for Africa (2007-2009)
- Second Harvest Foodbank Volunteer (2006-2010)

## **Margaret Dioguardi**

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### **Executive Summary**

Margaret Dioguardi brings over 20 years of experience with a varied background in project management, marketing and communications across a range of industries such as employee benefits, publishing, event planning and health care. Whether implementing a new program or a new position within an organization, Margaret works to bring diverse groups (with sometimes divergent objectives) together to develop creative solutions to achieve desired outcomes.

### **Employment History**

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Rebound Solutions	August 2013 to Today
Além International	July 2012 through January 2013
Twin Cities Automotive	December 2007-November 2011
Motorwerks BMW	December 2006-December 2007
<i>The Rake Magazine</i>	September 2004-December 2006
Twin Cities Fine Arts Organization	March 2004-November 2004
Larson Allen Financial LLC	August 1999-December 2002
Everen Securities	December 1997-February 1999
Hewitt Associates	October 1992-December 1997

### **Work Experience**

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#### **Rebound Solutions (August 2013 to Present)**

Margaret has been engaged as a project manager in the health care sector. She has been involved in a variety of projects related to the implementation of the Affordable Care Act (ACA) for individual and family health insurance plans. Margaret has been responsible for implementing and managing several projects:

#### **Go To Market Reporting and Proposal Evaluation Tool**

As the organization prepared for the implementation of ACA, Rebound Solutions was hired to develop reporting for the executive team to understand the current status of multiple Go To Market projects as well as a tool to evaluate the feasibility of new initiatives. Working with a number of stakeholders across multiple departments, Margaret captured and consolidated their efforts to communicate the status of the work in a manageable format. She also led the initiative to develop an evaluation tool for use by the executive leadership team to efficiently and effectively evaluate proposed initiatives by applying consistent criteria.

#### **Entrepreneurial Training Program for the Colorado Sales Team:**

With the enormous changes brought about by the Affordable Care Act, the sales team needed to move towards a more consultative sales approach. Margaret worked with the Sales Director to develop a program to build the skills and technical knowledge to sell in this new landscape. As the project manager,

Margaret managed the vendor selection process, worked with the vendor to develop the training program and roll it out to the sales team. Engagement with the sales team to identify priorities and define tangible outcomes was key to the success of this program. Margaret worked with the trainer and the sales team to develop new sales tools and methodologies to increase sales within market service areas.

### **Lead Management and Distribution Program**

Recently, Margaret has worked with the client's lead generation provider, advertising and marketing team, strategy department, corporate program office and the national call center to develop a plan to distribute, manage and report on the progress of a large lead database. Often there are competing priorities or resistance to a defined process. Margaret formed a work group to engage stakeholders, subject matter experts, and vendor representatives to define a process, create a timeline and develop a tracking process for this sales lead program. The program will be used as a baseline for continuous improvement and identification of best practices moving forward.

### **Além International (July 2012 to January 2013)**

In need of organizational structure and operational processes, Margaret worked with the leadership team, account executives and program managers to create resource planning calendars, tracking and submission tools for creative services and budget templates to streamline the billing and reconciliation processes.

### **Twin Cities Automotive (December 2007-November 2011)**

A new retail automotive group with a mission to reinvent the sales and service experience for the customer brought Margaret on to assist with operational assistance as well as managing the advertising and marketing for the group. In partnership with the directors, managers, and the sales and service teams Margaret developed the marketing strategy and communication program to build brand awareness. As part of the community relations efforts she worked with non-profit and community organizations to create a program that supported the local community as well as corporate philanthropic goals. Seeing the need to manage sponsorship and donation requests as well as an opportunity for employee involvement, Margaret worked with team members to create a sponsorship program with defined guidelines, review criteria and a sustainable budget.

### **Motorwerks BMW (December 2006-November 2007)**

Margaret joined Motorwerks BMW to focus on event marketing and manage the advertising budget for a newly built, state of the art dealership. She created promotional and community service events that involved dealership employees as well as public and private community partners. By engaging employees from every department and securing participation from vendors and local community organizations, the signature BMW Drive for the Cure event in 2007 saw a significant increase in attendance and donations.

### ***The Rake Magazine (September 2003-November 2006)***

Margaret joined *The Rake* as the inaugural Promotions Manager. In addition to her involvement with the creation and launch of Twin Cities Restaurant Week, she worked with the sales representatives and creative team to develop media partnerships, design promotions and create community partnerships to build brand awareness, increase advertising revenue and expand market share.

### ***Twin Cities Fine Arts Organization (March 2003-November 2003)***

Working with member galleries, museums and board members, Margaret planned the annual *Art on the Town* event involving over 60 organizations. By communicating and demonstrating membership benefits, Margaret increased the renewal rate and membership base by 15%.

### ***Larson Allen Financial LLC (August 1999-December 2002)***

Margaret worked with small and mid-size employers to design effective retirement plans. Seeing the need to differentiate and expand beyond the existing client base, Margaret worked with the marketing department to initiate the redesign of the marketing materials and message.

### ***Everen Securities (December 1997-January 1998)***

Working on a team of four marketing associates, Margaret provided retirement plan support to over 1700 investment consultants by conducting training seminars and providing marketing materials for small businesses and sole proprietors.

### ***Hewitt Associates (October 1992-November 1997)***

One of the first to market with daily valuation of 401k plans, Margaret joined Hewitt Associates as a consultant and was part of the development of procedures that served as a prototype for best practices within the industry. Consulting with clients, Margaret worked with clients to define program requirements and streamline administration for benefit plans. She also managed and trained a team of seven consultants.

## **Education**

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- BA Economics, Marquette University

## **Community Involvement**

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Project Angel Heart Volunteer Kitchen Assistant 2014-Present

Cystic Fibrosis Foundation of Denver Special Events Volunteer 2013-2014

Reading Partners Volunteer Tutor 2013

House of Hope Pantry, Boulder Volunteer 2013

Community Board Member, Ridgedale YMCA 2011-2013

Butterball Silent Auction Co-Chair 2003-2004

Second Harvest Heartland Volunteer 2003-2004