



**Harris County Department of Education
RFP #20/022YR Contracted Services for Information Technology
Due Date: January 21, 2020**



Prepared By:

Worldgate, llc
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Yaritza Roman
Purchasing Division
6300 Irvington Blvd
Houston, TX 77022-5618

Worldgate, llc is pleased to submit this proposal in response to Harris County Department of Education (HCDE) RFP # 20/022YR for Contracted Services for Information Technology. We appreciate the opportunity to partner with HCDE to provide highly qualified Business Analysts and Process Consultants as identified in Part C of this RFP. As required, each of the potential candidate resumes provided represent individuals who meet or exceed the minimum qualifications of two years of experience in these areas. Worldgate understands the importance of providing career opportunities for consultants in Harris County and we work to employ the local workforce whenever possible. We are confident in our ability to provide HCDE with high quality, professional personnel to evaluate and review process and procedures across multiple departments to improve workflow within HCDE.

Leveraging lessons learned from work with school districts and public sector organizations across the country, we believe Worldgate is uniquely positioned to fulfill the requirements of this RFP. Worldgate is a Nationally and Texas-Certified Woman Owned Business Enterprise headquartered in Reston, Virginia and with offices in Philadelphia, Atlanta and Houston.

As an ISO 9001:2015 Certified firm founded by executives from Fortune 50 IT organizations and top consulting firms, we have developed a proven and repeatable process to ensure the success of our clients. By leveraging our cost-effective and successful technology modernization, strategic advising and leadership development practices, our clients can focus on providing equitable teaching and learning opportunities for their students, staff and their community while being fiscally responsible.

We are currently providing San Antonio ISD with an experienced, on-site Project Manager to support their implementation of modern ERP (Enterprise Resource Planning) and SIS (Student Information System) and were recently selected by North East ISD, Richardson ISD and Allied States Purchasing Cooperative (Region 19) as an approved technology consulting and staffing provider. We look forward to the opportunity to engage with HCDE to support you and your member districts.

We are enthusiastic about the prospect of working with HCDE on all of your mission-critical technology initiatives and are confident in our team's ability to deliver above your expectations.

Thank you for your consideration.

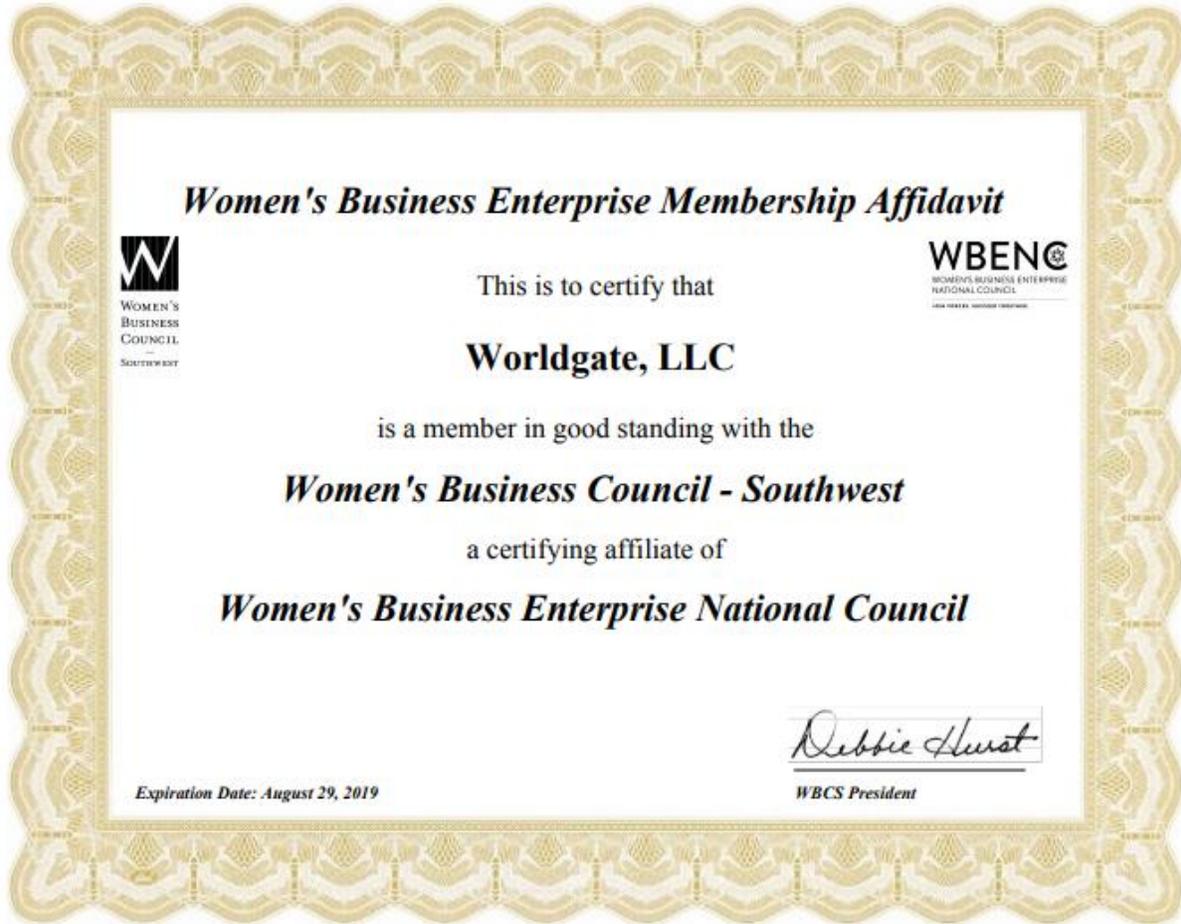
Diana Richie

Diana Richie, Vice President of Sales
281.961.1634
drichie@worldgatellc.com

General Information

Worldgate, llc., established in 2002, is a K-12 and public sector-focused technology management, consulting, and staffing firm based at 1760 Reston Parkway, Reston, Virginia with offices in Philadelphia, Atlanta and Houston. We offer superior, value-priced services and reliable delivery for our clients.

As a National and Texas Women's Business Enterprise, Worldgate values diversity and is an equal opportunity employer. The following certificates highlight our accreditation as a member in good standing for the Women's Business Enterprise associations in Texas. In addition, Worldgate provides a Certificate of Fact confirming we are registered to do business in the state of Texas.



Corporations Section
P.O.Box 13697
Austin, Texas 78711-3697



David Whitley
Secretary of State

Office of the Secretary of State

Certificate of Fact

The undersigned, as Secretary of State of Texas, does hereby certify that the document, Application for Registration for Worldgate, llc (file number 802110701), a VIRGINIA, USA, Foreign Limited Liability Company (LLC), was filed in this office on December 03, 2014.

It is further certified that the entity status in Texas is in existence.

Delayed Effective date: December 04, 2014

In testimony whereof, I have hereunto signed my name officially and caused to be impressed hereon the Seal of State at my office in Austin, Texas on February 15, 2019.

A handwritten signature in black ink, appearing to read "David Whitley".

David Whitley
Secretary of State

With over 10 years of experience providing medium to large school systems with technology consulting, staffing and managed services, Worldgate has built a reputation in the industry as a trusted advisor. We support districts in planning for, implementing and sustaining mission critical enterprise applications including Enterprise Resource Planning (ERP), Student Information Systems (SIS), Content Management Systems (CMS), Learning Management Systems (LMS), data warehouse and data visualization and analytic systems. In addition, we are Kronos’s go-to implementation partner for their K-12 and higher education customers specializing in implementing Kronos’s Workforce Ready Time and Labor solution “Time for School.”

The categories of technology consulting services and staffing support we provide include:

- Project Management
- Change Management
- Organizational Leadership Development and Coaching
- Functional and Technical Development
- Cloud ERP Consulting
- Kronos Workforce Ready Consulting
- Business Analyst
- Business Process Redesign
- Technical Writing
- Database Administration
- IT Help Desk
- Training
- RFP Development

Worldgate has over 40 employees working across the country at multiple client sites and departments. Our Vice President of Delivery, Rob Moser, former IBM K-12 Practice Project Management lead, manages all Worldgate personnel who provide on-site support to our clients. Diana Richie, our Vice President of Sales and Client Engagement, lives in the Houston area and has worked in the K-12 industry for over 20 years. She oversees our Recruitment and Client Engagement divisions that implement Worldgate’s Talent Acquisition Methodology. Our Talent Acquisition Methodology is designed to rapidly source local, high quality and culturally aligned personnel for our K-12 and public sector partners. Below is a high-level overview of Worldgate’s 3-stage talent acquisition strategy model:

Worldgate Talent Acquisition Methodology



Identify

Worldgate assigns a Client Engagement Manager (CEM) for the duration of each contract who is the direct point of communication. The CEM will take the initiative to meet and learn more about the culture, mission, priorities and organizational structure of HCDE. As a strategic partner, Diana Richie will be your CEM.



Upon receiving an initial opportunity, Diana will work with you to complete a requirements analysis to identify your position requirements and ensure that the work environment, technologies, corporate culture, and other intangibles are communicated to our recruiters to find the best candidates. Once we have received a task order, our team meets to discuss the particular requirements and to determine what additional information is necessary to qualify and present candidates.

Identifying the position parameters and organization culture allow us to leverage a particular sourcing pillar for candidate discovery. Worldgate pillars of sourcing include our current consultant base, recruitment systems, professional organizations, community and ecosystem, our applicant tracking systems containing passive and active candidates, and a comprehensive social media campaign when necessary.

Evaluate

Worldgate's staff evaluates candidates in a tiered approach depending on the task order and requirements. The first tier includes an initial phone screen, which we use to match location, availability, experience, skillsets, attributes, career goals, soft skills and salary expectations. Our goal is to work as hard and as fast as possible to find the most qualified candidates that qualify for the interview stage.

Tier two requires phone and in person interviews with the CEM, Diana, to ensure that we match you with the most qualified candidates whose knowledge, skills, abilities and desires align with you needs. As needed, we administer a professional skills and technical assessment depending on the job requirements.

Propose

After our candidate evaluation is completed, your Worldgate CEM will propose candidate profiles and resumes for your review and then schedule in person interviews.

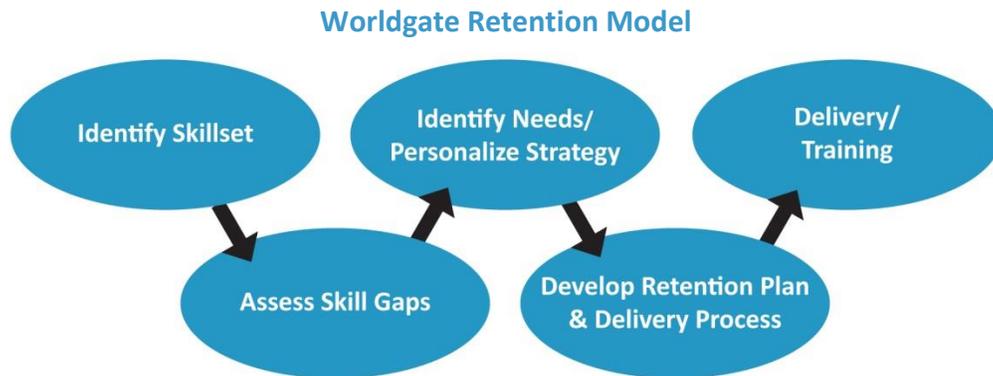
Once the interview is scheduled, we meet with the candidate to discuss the interview process and share more about HCDE, including your technical and cultural requirements. It is important for the candidate to be excited about the position and the opportunity to work with HCDE. We make sure that the candidate has all pertinent information regarding location, date and time. After the interview, the CEM will schedule a post-interview meeting with the candidate to gain critical feedback.

The ultimate goal of Worldgate's implemented Talent Acquisition Methodology is to provide you with the best candidates, at the best rate, and as quickly as possible.

Retention Strategy

Whenever possible, Worldgate will employ the candidate you select, rather than providing a contractor, in order to offer full benefits and professional development opportunities. We know our employees are what differentiates us from staffing firms and we work to create individualized development plans to ensure their success. Our culture encourages our staff and project managers to

coach, mentor and share knowledge with fellow employees. Worldgate's step-by-step retention strategy is shown below:



Identify: Worldgate first identifies skillsets which match the current and future goals of the company or organization and at the same time identifies what skillsets are needed for current and targeted projects. Worldgate then identifies those skillsets within our employee base and identify specific employee skillsets to better understand where our capabilities reach.

Assess: Worldgate assesses where knowledge or skill gaps lie in our employee base. It is important to assess quickly if an employee knowledge gap must be filled immediately or if that gap can be targeted over time. Your Client Engagement Manager, Diana, will work with the HCDE hiring manager to conduct a 90-day evaluation and annual evaluation of each employee to ensure your satisfaction and support our employee's continued growth.

Personalize Strategy: If we collaboratively identify gaps in an employee's knowledge or skills or if the employee identifies areas for growth, we personalize and tailor professional development for each employee.

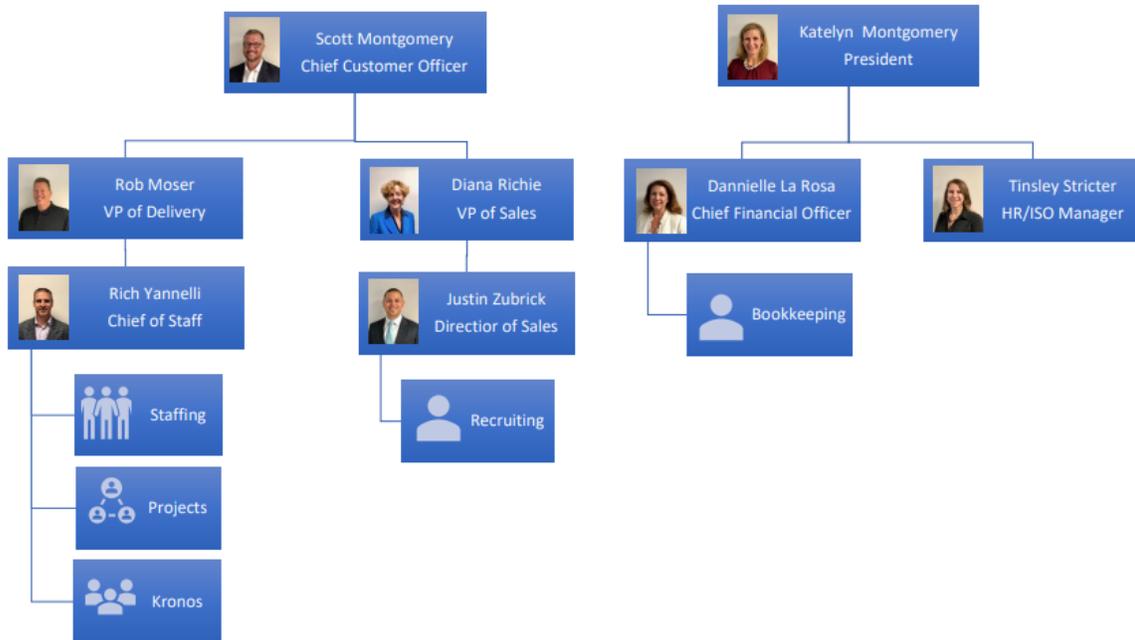
Develop: Worldgate develops an individual development and retention program for each employee. Each plan will determine training programs, continuing education, coaching and other tools which are deemed appropriate in the advancement of that employee.

Delivery: Once an employee has closed any knowledge or skill gaps relevant to the needs of a client, Worldgate is able to deliver a resource who meets project requirements and is aligned with organizational goals.

Throughout this process, a trusted relationship is forged among Worldgate, our employee and our client and all recognize the need for continuous collaboration, communication and improvement.

Proposer's Team

The following Organizational Chart reflects Worldgate's leadership approach. Our team of qualified individuals provide a comprehensive structure that ensures a high-quality partnership that, meets required schedules, complements deadlines and works diligently within the agreed upon budget.



Worldgate engages client leadership and program management with the goal of developing a holistic strategy that empowers technology to fulfill its role as an enabler of education success. The biographies identify key individual team member's roles, responsibilities, education and qualifications.



Katelyn Montgomery is the founder of Worldgate, LLC and helps to define Worldgate's vision, values, policies, and corporate strategy. In addition, Katelyn is responsible for all internal operations including Human Resources, Finance, and our Quality Management System. Katelyn brings over 20 years of sales, marketing, and account management experience across both small and enterprise business in the IT, telecommunications, and non-profit sectors.



Scott Montgomery is responsible for delighting our customers. He oversees the day-to-day operations of our Delivery, Consulting Services/Sales and the Recruiting teams. He leads efforts to collaborate with our clients and partners. Scott's leadership approach starts with employee well-being, growth and fostering a learner mindset. Scott gained his leadership skills and experience at Cisco leading a large team of client support professionals. He is a graduate of George Mason University's certification program as a leadership and organizational well-being coach, and is currently pursuing [ICF ACC](#) accreditation.



Rob Moser is the Vice President of Public Sector Professional Services. Since 2017 he has overseen every service engagement to ensure success and high client satisfaction. Rob has over 20 of experience in project management, strategy development, coaching, and organizational change management. He has led large school district and state education agency projects for IBM, Amplify (Wireless Generation) and as an independent consultant. He currently manages a team supporting the implementation of enterprise applications for our strategic school district client accounts. Rob oversees all school-based engagements from a management perspective and engages individually to support our partners as needed.



Richard Yannelli is the Program and Client Engagement Manager for Worldgate since 2018. Richard leverages his 35 years of K-12 industry experience leading academic and operational software systems development and implementation teams to manage, evaluate and support Worldgate's services staff working with our K-12 clients. He acts as a liaison to our client hiring managers aligning their needs the needs of the project with staff skills and expertise. In collaboration with the school district hiring managers, he evaluates Worldgate staff and works to ensure their success through continuous professional development, communication and recognition to create a positive work environment that ensures high productivity and employee retention. As Chief of Staff, Richard oversees all school-based engagements and projects.



Diana Richie is the Vice President of Sales, responsible for leading and developing our sales and marketing team to ensure we add value as a trusted advisor and thought partner to education clients. Diana began her career as a middle school and high school English teacher, and has made creating equitable learning opportunities through the effective use of instructional and operational technology her life's work. She advocated for educators and district leaders in her leadership roles at Compaq Computers, Hewlett-Packard and Oracle Corporation and most recently at the non-profit, New Teacher Center. Over the past year, in addition to her key sales role at Worldgate, Diana led the establishment of the Texas office and drives client engagement for Texas.



Justin Zubrick is the Director of Sales and Recruiting and has been with Worldgate since 2010. He leads our recruiting services to ensure we deliver the right people to solve our client's most demanding challenges. Justin has built Worldgate's Talent Acquisition practice and is skilled at understanding our client's needs and working closely with them to design effective staffing solutions. Justin leads the acquisition process working to identify unique personnel that support the needs of each school district client.



Tinsley Stricker leads the Human Resources department and the ISO certified Quality Management System. Tinsley works closely with our clients to align our HR practice with client requirements and processes. Tinsley ensures our employees feel valued and develops creative employee recognition and retention approaches. Tinsley ensures Worldgate adheres to all hiring laws and practices and has implemented Worldgate's HR system.



Dannielle LaRosa leads Worldgate's Accounting and Finance division as our Chief Financial Officer, Dannielle. Dannielle brings over 20 years of experience in finance, treasury and accounting at both public and private companies. Dannielle has a proven record of accomplishment of collaborating with our clients to ensure billing requirements are met.

Resumes

The following resumes highlight the education and experience of our staff most relevant to the requirements outlined in Part C- Business Analyst and Process Consultants. As required, each of these potential candidates meet or exceed the minimum qualifications of two years of experience in these areas. Worldgate understands the importance of providing career opportunities to the local economy. With all of our engagements, we strive to source qualified, local personnel to increase resident employment and control travel costs.

| | |
|------------------|----------------------------------|
| Program Manager | Lonnie S., Stephen R. |
| Project Manager | Steve P., Richard Y. |
| Business Analyst | Sreedevi D., Samuel R., Sally N. |
| Trainer | Ron W., Linda H. |
| Technical Writer | Logan C. |

Lonnie Snyder

SKILLS AND ABILITIES

- **Project Management tools:** Microsoft Project, Microsoft Project Server, Project.net, Smartsheet
- **Software:** Oracle E-Business Suite and PeopleSoft, Microsoft Dynamics GP, Lawson Financials, Frontline Education SIS & ERP, Salesforce, MSOffice Suite (Outlook, Word, Excel, Access, PowerPoint), Project, Visio, Adobe Publisher, Crystal Reports, COGNOS, WebFocus, Microsoft SSRS
- **Database:** Oracle, SQL, Sybase
- **Operating Systems:** Microsoft Windows, Microsoft Server OS, Linux, Solaris, Mac OS, Unix.
- **BI/Knowledge Management:** WebFocus, BizTalk, SharePoint, Business Objects, SSAS, Broadvision, SiteServer.
- **Data Warehouse/Administration:** Business Objects, SQL Server, DB2, Sybase, Oracle, Informix

EXPERIENCE

Worldgate, Ilc., San Antonio, TX

2019-Present

Senior Project Manager (assigned to San Antonio ISD) San Antonio, TX

Acting as a subcontractor to Frontline Technologies, Lonnie is responsible for the overall project management of San Antonio ISD's (SAISD) new Frontline Education Student Information System and Enterprise Resource Planning System replacing the district's legacy systems previously managed by Region 20 Education Service Center. In this role, his responsibilities include:

- Conducting a business process review of current processes and procedures and collaborating with department heads and individuals assigned to this project to take full advantage of the opportunities to automate tasks, improve efficiencies and implement best practices using Frontline's modern software;
- Working with Frontline and SAISD to identify resource gaps on the team from a business standpoint and then facilitate with school district leadership to supply the resources necessary to have a successful implementation
- Working with Frontline and SAISD to define tasks and appropriate resource levels for the district's project team
- Making decisions related to project scope, scheduling, and task assignment, and communicates decisions and commitments to SAISD and Frontline
- Working closely with Frontline and SAISD to identify issues that need resolution to ensure the project progresses on schedule
- Facilitating system configuration to satisfy SAISD and Frontline requirements
- Coordinating development of test cases that will be utilized during all testing phases of the project
- Participating in the appropriate meetings to drive issues to resolution that ensures a successful implementation of the solution
- Participating at the appropriate check points in the project to provide approval to the solution delivery of the project

Lonnie Snyder

- Participating in the application and system tests to ensure a high-quality solution is delivered to the school district
- Capturing lessons learned in order to modify the roll out of the Frontline solutions template to other school districts within the State of Texas and across the country

TDS/OneNeck IT Managed Services, San Antonio, TX

2009 – 2018

Senior Project Manager (assigned to Flowserve), San Antonio, TX

- Responsible for managing the overall and ongoing service delivery for assigned large, complex or strategic customers that utilize Cloud and hosting solutions, Managed services or ERP Application Management services, ensuring compliance to SLA's and overall client satisfaction.
- Relationship management with CIO and Senior Management. expectation setting, strategic and tactical planning, including the translation of client goals and objectives into solutions.
- Provide primary liaison for client requests and communications pertaining to contracted service delivery, customer satisfaction and escalations.
- Manage overall client service delivery in compliance with contracted service definitions, quality and financial performance.
- Manage and maintain internal and customer facing data, procedures and documentation in support of effective client service delivery.
- Develop, Prioritize and Manage internal and customer facing initiatives designed to improve service deliver and review current and historical service delivery, quality and financial performance.

Full ownership for scoping, planning, management and delivery of all levels of projects including:

- Migrate Oracle EBS and related systems to AWS and Azure UK and US cloud platforms. [Scope: 150 servers, 3 manufacturing plants, 2 UK Data Centers]
- Deploy Oracle EBS and Great Plains ERP systems at manufacturing plants, offices, retail locations, and distribution facilities replacing existing ERP systems (SAP, JDE, Lawson, Spreadsheets). [Scope: 26 sites in 17 countries; versions R12, 11i]
- Upgrade existing deployments of Oracle ERP at manufacturing plants, offices, retail locations, and distribution facilities. [Scope: 32 sites in 27 countries; versions R12, 11i]
- Execute P2V server migrations for ERP and related systems. [Scope: 326 servers]
- Migrate physical and virtual servers from antiquated Storage Platform to Dell/EMV VxFlex and Avamar platforms for storage, backup, and compute. [Scope: 600 servers, \$4.5MM initial budget]
- Business Intelligence product selection and deployment for global manufacturing company. [Scope: 50 servers, \$2.5MM initial budget]
- Implement bank and third-party interfaces for daily file transfers for global manufacturing company. [Scope: 30 interfaces]
- Global workstation upgrade. [Scope: 300 locations, 25,000 workstations]
- Data Center Relocations from the US to the UK for GDPR compliance purposes.

Liquid Networks, San Antonio, TX

2008 – 2009

Contracted Senior IT Manager for Harden Healthcare Systems, Golf Smith, Amedisys, etc.

Lonnie Snyder

- Deploy new infrastructure and voice/data connectivity and VoIP solutions to retail and medical operations throughout the US and Canada. [Scope: 147 sites]
- Develop and manage the construction and setup of a new Network Operations Center for 24x7 operations and customer service support for an outsourcing ERP and data center organization.
- Design, select, and implement an inventory control system for both operational and customer infrastructure equipment and supplies. [Scope: \$24.75MM of inventory]

Cal-Tex Protective Coatings, Schertz, TX

2006 – 2008

Director, Information Systems & Human Resources.

- Responsible for daily operations and strategic planning for Information Systems and Human Resources.
- Developed and managed the Project Management Office and implemented standards for project management and the Software Development Lifecycle.
- Responsible for planning and execution of office space expansion and establishment of co-location facility for DR. Served as IT liaison for marketing and finance to include the deployment of Business Objects for BI, Microsoft Dynamics Great Plains for ERP, and Microsoft Dynamics CRM system for customer and agent management for 3,200 employees.
- Deployment of Microsoft CRM System for retail automotive manufacturer. [Scope: 1,750,000 customers; 200 companies; 1,500 employees]

World Savings, San Antonio, TX

2003 – 2006

Director III, Information Systems Department – Technical Team

2005 - 2006

Senior Business Analyst - Business Team

2003 - 2005

- Manage the Database Administration and Application Testing and Governance Teams.
- Developed and deployed a Project Management Office including developing, recruiting, and staffing the department organizationally, selected and implemented project tools, quality assurance methodology, creating the best practices for project prioritization and management, business transformation principals, developing PMP certification training programs, and managing the initial deployment of the project request and prioritization system.
- Managed the development, deployment, and supported of a Loan Origination System that handled over \$100B in Assets. [Scope: 3,000 users; 24 interfaced systems; 250 loan centers]

Frost National Bank, San Antonio, TX

2001 – 2003

Vice President, Application Development and Deployment

2002 - 2003

Senior Project Manager, Project Management

2001 – 2002

- Implementation of the systems and the infrastructure for a Securities Lending and IPO consulting company. The project included testing systems, hardware, and processes and a full audit by the SEC prior to opening. [Scope: \$2.5MM project budget for systems procurement and implementation]
- Implementation of electronic commerce initiatives and trust management system for major financial institutions. [Scope: Project budget of \$52MM; ROI of \$500MM; system managed \$1.5Billion in trust funds]

Lonnie Snyder

- Managed the Y2K testing and certification of applications and processes for a major banking operation. The project was audited and approved by the FDIC and SEC upon completion. [Scope: 450 applications tested; project duration was 2 years]
- Deployment of desktop computers and associated bank specific and personal productivity applications to 127 branches of a major banking operation in Texas

The SCOOTER Store, New Braunfels, TX

2000 – 2001

Director, Information Technology, Facilities, Special Projects

- Developed an Information Technology department responsible for the initial deployment and sustained operation of both voice and data infrastructure, systems, and applications.
- Served on the executive management team responsible for the development of corporate operating and financial standards.
- Serve as a member of the executive management group and officer of the corporation and fully participate in the development and implementation of the strategic direction for the marketing, operations, and finance areas.

Computer Solutions, San Antonio, TX

1998 –2000

Project Manager, System Integration

- Data Center Relocations for Manufacturing, Oil & Gas, and C-Store organizations. [Scope: 3 relocations, 100+ cabinets, distances from 30 miles to 1,500 miles].
- Developed the project justification, charter, and plan for the implementation of a distance learning system to connect remote campuses and students at a major medical school. [Scope: \$2.0MM startup budget; 10 campuses; 400 students]
- Managed the planning and implementation of an interactive voice response system for the credit card center division of a major oil company.
- The project led the way for a complete Computer Telephony Integration system. This project resulted in 52% of the calls be successfully handled to completion without agent intervention. [Scope: 5,000 daily calls; \$1.2MM project budget]

USAA, San Antonio, TX

1997 – 1998

Team Lead, IT/Customer Service Organization

Manager, Web Advisory and Knowledge Management Group

Diamond Shamrock, San Antonio, TX

1985 –1997

Senior Manager, Information Technology Systems Infrastructure

1996 - 1997

Manager, Electronic Commerce

1995 - 1996

Senior and Lead Systems Analyst

1990 - 1995

Associate and Systems Analyst

1986 - 1990

Senior Refinery Accountant

1985 - 1986

- Performed the marketing, planning, and implementation aspects for an inmate imaging and management system for correctional facilities. The system included bar code scanning, imaging, database management, fail-over, redundancy, security, and integration with the on-site phone system, local, county, and state correctional management systems and regional and national FBI management systems. [Scope: Installed in 100 major correctional facilities, \$10.5MM budget].

Lonnie Snyder

- Deploy MSMail followed by upgrade to MS Exchange/Outlook for an oil refining and C-Store company. [Scope: 32,000 users; 1,200 C-Stores; 3 refineries]
- Design and deploy initial corporate web page focused on credit card operations and functionality for an oil refining and C-Store company. [Scope: 1,000,000 customers; 1,200 stores]

Tenneco Oil Company, Houston, TX
Natural Gas Processing Accountant

1984 – 1985

EDUCATION & PROFESSIONAL CERTIFICATIONS

Bachelor of Business Administration - Accounting, 1984, Southwest Texas State University.

Certified Public Accountant, 1986, Texas License 042905.

PMI Member (1409785) - PMP course work and eligibility complete.

ISO 21500 Project Management Certification

ISO SOX and SAS 70 Audit Training.

ITIL Foundation Training.

Six Sigma CIP Green Belt Training

SKILLS

Oracle System Administrator Fundamentals

OracleAS 10g R3: Java Programming

Extend Oracle Applications: Building OA Framework Applications

Kronos Workforce Central

Completing PMI PMP Certification & CoSN CETL Certification (K-12 CIO Certificate)

EXPERIENCE

Garland Independent School District, Garland, TX

1997-2019

Director, Oracle Technology Group, Garland Independent School District

2005-2019

- Served as district project manager for multiple business application implementations and upgrade initiatives including Oracle E-Business Suite, Oracle Planning and Budgeting Cloud Service (PBCS), and Kronos Workforce Central
- Managed and directed business applications for the district
- Analyzed complex business needs presented and recommends technical solutions that align with district objectives and best business practices
- Demonstrated ability to communicate and work well within all levels of the organization to achieve district goals
- Ensured the consistency and maintainability of existing business applications by creating, maintaining, and enforcing standards and procedures for implementing technical solutions
- Directed operations in executing production tasks in accordance with a documented schedule that meets or exceeds customer expectations
- Developed strategic plan and vision for business applications
- Continuously monitored change requirements and manage changes in scope
- Maintained service level agreement (SLA) and operational level agreement (OLA) with key stakeholders and technology organization utilizing ITIL framework.
- Identified budgeting operational and personnel requirements for business applications group.
- Determined scope of projects/initiatives and implement decisions for best business practices.

Stephen Reeves

Assistant Director – Maintenance, Garland Independent School District**1997-2005**

- Managed and supervise all business operations within the department of maintenance and operations.
- Developed, formulate, and control operating budget of over 5 million dollars for the entire department.
- Managed personnel processing and records for over 400 maintenance employees.
- Responsible for all aspects of the facility management system.

Developer/Programmer, Garland Independent School District**1997**

- Designed and developed programs to accumulate student data from the student information system for the purpose of generating detailed reports for each individual location as well as top administration.
- Assisted in the development of the student information system
- Produced support programs for district bus routing application

Operations Specialist - Maintenance, Garland Independent School District**1989-1997**

- Monitored all programs related to the Facility Management System and assisted with application training
- Managed inventory and fixed assets for the entire department.
- Assisted with the annual budget for the department.

Education**University of Texas, Dallas****1992**

Bachelor of Arts, Art and Performance

Steve Pummill

CAREER SUMMARY

Experienced Program Management professional with significant experience in education market: K-12 districts and state departments of education (DOEd). Proven ability to develop senior level client relationships and identify innovative solutions that can be successfully implemented to meet unique requirements of K-12 education market. Project experience with large states and large school districts leveraging latest U.S. Department of Education programs and grant initiatives: No Child Left Behind Act of 2001 (NCLB), Statewide Longitudinal Data Systems (SLDS) and Race to the Top (RtT). Recognized for strong teamwork and leadership qualities at client project level and corporate education industry teams. Proven education industry subject matter expert (SME) in these key areas.

- State DOEd's Longitudinal Data Systems (SLDS)
- Curriculum and Assessment Management Solutions
- State DOEd Teacher Certification Systems
- K-12 Education Data Warehouse (EDW)
- K-12 Student Information Systems (SIS)

ACCOMPLISHMENTS

DATA WAREHOUSE & REPORTING SOLUTIONS with Worldgate, IBM

Serving as project manager / project executive manager for design, development and implementation of Education Data Warehouse (EDW) solution to provide student level information to school and district level administrators to enable data-driven decision making for educational program effectiveness for the following school districts.

- Arlington County Public Schools (VA)
- Prince William County Schools
- Supreme Education Council of Qatar
- D3A2 Project for the State of Ohio
- Wake County Public Schools (NC)
- Charles County Public Schools (MD)
- Loudoun County Public Schools (VA)
- Anne Arundel County Public Schools (MD)
- Chesterfield County Public Schools (VA)
- School District of Philadelphia (PA)

STUDENT INFORMATION SYSTEM SOLUTIONS AND PROJECTS

Serving as project manager for the implementation of Student Information Systems (SIS) to manage all aspects of a district's student administrative data. Legacy systems were replaced with state of the art solutions for school administrators, teachers, parents and students to increase operational efficiencies and maximize reporting capabilities. Key districts include the following.

- Virginia Beach City Public Schools (VA) – Edupoint
- Genesee ISD (MI) – Edupoint
- Stafford County Public Schools (VA) – Edupoint
- Chesterfield County PS (VA) – Edupoint

At IBM and BDM / Northrop Grumman served as project manager / director to implementation of SIS solutions for the following districts.

- DC Public Schools – AAL / eSIS
- Gwinnett County Public Schools – Pearson / SASIxp
- Fairfax County Public Schools (VA) – SASIxp
- Prince William County Schools (VA) – SASIxp
- Dayton Public Schools (OH) – NCS CIMS

- Washoe County Schools (Reno, NV) – SASIxp

CURRICULUM AND ASSESSMENT MANAGEMENT SOLUTIONS:

- Identified solutions supporting K-12 teaching and learning at classroom level: curriculum integration, assessments, with tools and instructional content.

- Identified solutions that support upcoming RttT opportunities.

- Leveraged relationships with potential clients, software group and vendor partner components to identify solutions mapped to district requirements.

- Implementing Curriculum Repository solution at Charles County Public Schools (RttT funding from State of MD) and integration with district data warehouse. Project leverages software created by Fairfax County Public Schools

STATE DOEd: TEACHER CERTIFICATION SOLUTIONS

- Served as IBM's project manager for re-write of Texas Education Agency's (TEA) Education Certification system, while providing solution expertise to technical team on software components and created an accelerator for sales and implementation in other states.
- Served as project manager for successful implementation of Maryland State Department of Education's (MSDE) Teacher Credentialing System to collect and track teacher's certification application information and issuance of licenses.

STATEWIDE LONGITUDINAL DATA SYSTEMS SOLUTIONS at IBM

Massachusetts Department of Elementary and Secondary Education (ESE).

- Served as relationship and project manager on statewide Schools Interoperability Framework (SIF) Project. Coordinating IBM relationship with CPSI to develop business opportunities partner multiple state agencies.
 - Implemented solution that reduced time and cost while increasing accuracy of data collection from Local Education Agencies (LEAs) by State Educational Agency (SEA).
 - Provided near real time within and across LEA and SEA data systems to maximize data accuracy and reducing data collection burden.

Texas Education Agency's (TEA).

- Established senior level client relationship. Performed project management for Data Collection, Analysis and Reporting Investigation (TDCARSI) strategy project.
 - Conducted in-depth analysis of current data collection process and provided strategic roadmap for addressing educational, administrative and research needs of key stakeholders.
 - TDCARSI report is published on TEA web site that outlines overall strategy for next 5 to 10 years.

Provided business development support and subject matter expertise to the following projects.

- Ohio Department of Education (ODE): Statewide Student Identifier and D3A2 Data Warehouse Portal.
 - Provided item analysis reports to teachers based on students' performance on high stakes tests, which were correlated with curriculum standards and supplemental instructional content to assist teachers and students in targeting instructional weaknesses.
- California Department of Education (CDE): CALPADS (CA Longitudinal Pupil Achievement Data System).
 - Implemented comprehensive operational data store and underlying computing technology to collect, store, and report on statewide longitudinal student and other demographic elements required to meet NCLB requirements.

CORPORATE AFFILIATIONS

| | |
|---|--------------------|
| Worldgate, LLC, VA Project Manager | 2011-2013 |
| IBM AND PRICEWATERHOUSECOOPERS, DC / Northern VA Associate Partner | 2001 – 2011 |
| C INNOVATIONS, DC / Northern VA Vice President, Professional Services | 2000 – 2001 |
| IBM, DC / Northern VA Project Manager / Solutions Manager | 1998 – 2000 |
| NORTHROP GRUMMAN / TRW / BDM, DC / Northern VA Project Mgr. / Director, Education Services | 1992 – 1998 |

EDUCATION

- **BA, Mathematics / Secondary Education, College of Racine, Racine, WI**
- **Leadership in a Project Team Environment, School of Business and Public Management, George Washington University, Washington, DC, 2000**
- **Project Management Fundamentals, George Washington University, School of Business and Public Management, Washington, DC, 1999**
- **Quality Assurance Fundamentals in Services Solution Design, IBM, Bethesda, MD, 2000**

SUMMARY

A hard working, dedicated and conscientious management professional with over 35 years of **K-12 industry experience** leading academic and operational software systems development and/or third party solution implementations. Skills include project management, personnel management, vendor management and client relationship management with a laser focus being that our services are meeting/exceeding the expectations of our customers.

EXPERIENCE

Program Manager, Worldgate LLC

September 2018 - Present

Responsible for client relationship, staff management and operational support to ensure Worldgate is meeting the needs of its clients. Implement effective management strategies and procedures that align our corporate strategy with the needs of the client. Responsible for the management, administration, coordination, and evaluation of staff assigned to an account. Supports the needs of the staff through professional development, personal communication/engagement and motivation to help improve performance and maintain retention. Responsible for performance reporting to the client and corporate leadership. Addresses all personnel matters and interface with corporate and the client through resolution. Help to create a positive working environment that results in effective productivity and high performing teams.

Expanded details of duties include:

- **Client Relationship Management**
 - Project Alignment – Work with the client to understand what projects staff will be assigned to and assess the skills needed to be successful in those project areas
 - Interpersonal Relations – Be a liaison to the client for corporate and employees
 - Staffing Alignment – Align staff expertise to client work areas Work with clients to continually monitor needs of the client and align those needs with the skills of the employee
 - Find opportunities to support the client in creative ways and report back to corporate on client driven requests and issues
- **Staff Management**
 - Project Status Reporting – compile and review staff Status Reports
 - Organize staffing meetings
 - Provide insight on the needs of the client
 - Candidate Interview logistics and support
 - Employee on-boarding logistics and support
 - Employee Performance Evaluation
 - Individual performance monitoring with the client
 - Staff coaching and monitoring
 - Work with clients and staff to identify areas for professional development and training to improve employee skillsets
 - Develop training plans
 - Support with staff terminations

- **Operational Support**
 - Client and staff event/sponsorship coordination
 - Technology equipment logistics and support
 - Time Sheet review and approval
 - Time Off Request (TOR) review and approval
 - Professional Development logistics / solicit expense approvals
 - Review and approve expense reports

Director, Operational Systems, School District of Philadelphia September 1995 - September 2018

Responsible for supporting business process and technology needs in both the Academic side as well as various operational areas including Library Management, Transportation, Food Service, Facilities Management, Records Management and other administrative operations within the District. Managed a team of System Analysts and Software Developers responsible for building / implementing various technology solutions across multiple platforms (mainframe/client-server/Web). Worked with the customers on business process reengineering and finding or custom developing technology solutions that supported their operation. Worked with District leadership to set priorities, improve business processes, modify policies, improve efficiencies, enhance operational reporting, meet state reporting compliance requirements and various other initiatives.

Served as the Project Manager on countless **custom developed** applications built by internal staff. Led all aspects of the project from requirements gathering, system design, development/prototyping through implementation and training. The focus of many of these initiatives was to move the district from paper-based processes to web based functionality. Examples include but not limited to:

- Online Report Card System for K-12 (prior to purchasing a third party solution)
- Pre-K Assessment Reporting
- Online Message Board application for Principals, Special Education staff and School Security Staff to aid in information delivery to remote staff
- Records Management Request and Records Indexing System
- Biometric Time Tracking System (facilities employees)
- Absence Control Reporting with progressive action letter generation
- Various state compliance reporting projects

Led or was a team lead on many **vendor system** implementation/data integration projects including but not limited to:

- Schoolnet K-8 Course Scheduling / Gradebook / Custom Report Cards
- Student Records Request Tracking System (Scribbles)
- Follet Destiny Library Management System
- Horizon Food Services POS system
- Compass Transportation Management System
- Infinite Campus Student Information System (various modules)
- Various vendor data integrations

Programming Manager, School District of Philadelphia

September 1990 - September 1995

Responsible for managing a staff of computer programmers, assigning staff to development projects, managing personnel matters and training. Interfacing with the System Analyst staff to align resources to projects and set priorities, manage development schedules and ensure the projects were documented to department standards. Also worked with leadership to evaluate and procure infrastructure systems to enhance ability to deliver batch, online and reporting systems. Created departmental standard operating procedures and documentation standards.

Computer Programmer, School District of Philadelphia

May 1982 - August 1990

Developed batch data procedures, reports and online systems in various programming languages (COBOL, FORTRAN, RPG, CICS).

EDUCATION

Bachelor of Science, Kutztown State College / dual major in Business Administration (May 1982)

- Various Management training programs
- Various Project Manager training programs (currently studying for PMP certification)

SKILLS

- Business Process Design
- Project Management practices
- Relationship Management
- Leadership, Diversity and Inclusion
- MS Office, Visio, Smartheet, GSuite
- Flowcharting, Crystal Reports, SQL

ACTIVITIES

- Washington Township Youth Football Organization – Coach (2003-2018)
 - Board member 2004-2009
- Do It Yourself enthusiast (home remodeling projects)

Sreedevi Diwakarla

SUMMARY OF EXPERIENCE

- 8+ years of comprehensive experience in Business Analysis, Application Design, Development and Implementation
- 5+ years of experience in business analysis, design document and, test plan preparation using agile methodologies.
- 4+ years of experience in design, development and implementation experience on Salesforce.com using apex, visualforce, lightning, reports, dashboards and analytics.
- Experience in designing various models of case management approaches and approval processes.
- Comprehensive experience on SaaS, PaaS and other cloud related technologies and experience in realizing the business requirements to design to implementation.

TECHNICAL SKILLS

- Salesforce.com platform, APEX, SOQL/SOSL, Lightning Apps, Lightning Pages, Reports, Dashboards, Workbench, Visualforce, Workflows, Approvals, Email alerts, Validation rules, APEX, Data Loader, CPQ, Einstein Analytics
- Java, APEX, C, SQL
- Use case analysis, Agile Methodologies, Business Requirements & Functional Specification documents, Design documents, Test plans
- Oracle 12c, Microsoft SQL Server
- Windows, UNIX, Linux, Solaris
- Eclipse, Oracle J Developer, Oracle Visual Analyzer, OBIEE 12c, Oracle BI Administration Tool, Oracle SQL Developer, Tableau, Zoho Project management tool, Rational rose, Poseidon for UML, JIRA, MS Office

EXPERIENCE

Innive, Inc.

Feb 2016 – July 2018

Business Analyst & BI Developer, worked remotely in *Katy, Texas* and on various customer sites

Clients included: **Los Angeles Unified School District, Prince Georges County Schools, University of Florida, Board of Governors Federal Reserve, MasTec** (engineering and construction)

Innive's Products & Services:

- Innive Inc is a software development and consulting company that focuses on Business Intelligence and BigData solutions for K-12 and Transportation industries.
- Contributed to the complete product development lifecycle of K-12 School Analytics product's Student Analytics, Teacher Analytics, Leadership Tracking System, Leader VAL-ED Evaluation modules and advanced visualizations.

Sreedevi Diwakarla

- Gathered requirements, Analyzed KPIs, Facts, Dimensions and helped with the Data model creation of various modules like Passengers, Operations, Financials, Parking, Baggage and Concessions of Airport Analytics product for Smart Airports.
- Worked closely with the development team to help develop the OBIEE and Tableau BI dashboards and visualizations for Airport Analytics product. Evaluated the capabilities of Visual Analyzer for Oracle BI Cloud Service.
- Researched, analyzed and documented detailed business processes of Pinellas County's Water Management, Fleet Management, Human Services Management, and County Transparency along with other Florida State Counties.
- Contributed to several Request for Proposals (RFP) and RFI documents related to San Diego School district, Rochester School district, ADAC (Abu Dhabi Airport), City of Madison and Federal Reserve System (Board of Governors) projects to help the project management team

Client: Los Angeles Unified School District

- Lead the complete product development lifecycle of LA Unified School District (LAUSD) - Focus project, which is designed to give comprehensive insights into LAUSD's student performance, food services and student demographics using advanced visualizations.
- Contributed to the complete development of Food Services – Cafeteria Management System, Café LA. Café LA operates the largest School Breakfast Program and the second largest National School Lunch Program in the United States, serving over 700,000 meals each day, which include a breakfast, lunch and supper after school.
- Worked on the front-end UI custom framework development for the visualizations and guided the UI Team related to troubleshooting the framework issues.
- Trained a team of junior developers in OBIEE & Custom Framework and testers for end to end testing.

Client: MasTec

- Worked on the wireframes design of the proposed dashboards and according to the user requirements and presented dashboard prototypes with insights such as Executive/Manager/Analyst and Functions such as Executive Summary, Finance, AT&T Turf, Operations, and Human Resources.
- Guided BI Developers to produce the dashboards of MNS Finance, P&L Summary, Operations and Human Resources, AT & T Turf & Plan of Execution, Score Card (KPI View/Map View) using various KPIs like Revenue, Direct Margin and Direct Cost.
- Worked on development of OBIEE reports and dashboards with various Views for Revenue & Direct Margin Analysis, Labor Productivity, and Project Cost areas for AT&T Turf. Involved in the testing according to the use cases.
- Helped with the design, implementation of front-end custom framework components and enhancements and go-live of the executive dashboards.

Client: Board of Governors of the Federal Reserve, VA

- Worked on the business analysis of HR Analytics based on the requirements. Contributed to the research, KPI analysis and data model creation of various areas of HR analytics like Workforce

Sreedevi Diwakarla

Development, Workforce Profile, Recruitment, Compensation, Performance, Absences, Retention, and Human Resources.

- Worked on the data model design, wireframes design of the proposed dashboards and the dashboard prototype creation.

Client: Prince Georges County Public Schools, MD

- Worked on the BI visualizations and dashboard analysis of Leadership Tracking System including the Leader Search, Leader Profile, Leader & School Performance dashboards.
- Worked on improving the BI dashboards for Student Analytics (Student Performance, Search & Profile), Predictive model based on Student Early Warning System, Teacher Performance and Teacher Profile visualizations.
- Researched and analyzed the Leadership attrition and retention for Principals and Teachers by identifying the KPIs and documenting various Case Studies of Maryland and other State School Systems.

Client: University of Florida

- Participated in the requirements gathering and contributed to the data analysis for the Minority Teacher Education (MTE) Program.
- Designed wireframes and helped with prototypes of various dashboards like MTE Program – Conversion View, MTE Program - Status Report, MTE Program – Institutions Report and Infographics based on the requirements of the Institutions and the MTE Scholars

Environment : OBIEE 12c, Oracle BI Administration Tool 12.2.2.0.0, Oracle SQL Developer 4.1.5, Visual Analyzer, Oracle BICS, Tableau 9.3, Zoho Project Management Tool, MS Office, JIRA, Agile methodologies.

America for Animals (Nonprofit Organization)

2016-2018

Salesforce Administrator/Developer, worked remotely in *Katy, TX*

As a Salesforce Administrator/Developer led the development of AFA's constituent management system built on top of Salesforce.com. As a developer/administrator, Sree was responsible for the following:

- Customized donation management and volunteer management systems to AFA's requirements.
- Created reports and executive dashboards to track new leads, donations, volunteers and the volunteer hours to run the organization much more effectively and meet the organizational goals.
- Configured and customized the business processes for various Salesforce.com objects such as Cases, Leads, Opportunities and Campaigns to fit AFA's requirements.
- Developed various custom objects, entity-relationship data model, workflows, field updates, validation rules, email alerts, and Visualforce pages to make the users much more effective in running the business.
- Created profiles and implemented object and field level security to hide critical information on the profile users.
- Designed and Developed the Apex classes, Visualforce pages, batch Apex, and Triggers, page layouts, search layouts to make the system user freindly.

Sreedevi Diwakarla

- Created templates, approval processes, approval page layouts and defined approval actions on them to automate highly manual and time-consuming processes.
- Migrated Salesforce configuration changes developer, sandbox and production environments using change sets
- Created users, roles, public groups and implemented role hierarchies, sharing rules and record level permissions to provide shared access among different users to manage and maintain application integrity.
- Created test scenarios on Sandbox environment, created packages and moved it between Developer, Sandboxes and Production environments.
- Trained the end users in creating reports, dashboards, task management.

Environment: Salesforce.com platform, Custom Objects, Custom Tabs, Force.com Sandbox, Data Loader, Apex programming language, Controllers, Sharing rules, Visualforce pages, Workflows, Email updates, Validations rules, Web Services API, Reports, Dashboards, and Workbench.

One Algorithm

2014-2015

Business Analyst/Developer/Admin, *Houston, TX*

As a Salesforce.com business analyst/developer/admin on various projects at One Algorithm, I have worked with a wide variety of clients developing and administering Salesforce.com applications.

- **Responsibilities:**

- Gathered business requirements from sales teams and business users to develop functional specification and map those requirements to Salesforce.com functionality.
- Did gap analysis to create roles/profiles and associated workflow/approval processes to satisfy business requirements.
- Created documentation for user stories, analysis, validation rules, assignment rules, flow charts and testing plans. Developed testing scripts to support the business process functionality.
- Developed Case Management and Lead management to meet organizational needs using web to case, e-mail to case, web to lead along with required lead and case assignment rules.
- Customized page layouts for Campaigns, Leads, Opportunity, Contacts, Cases and Accounts depending upon user roles, groups, and defined object and field level security.
- Used Force.com developer toolkit including Apex classes and Controllers to develop custom business logic and wrote Apex Triggers for custom validation process.
- Created and customized reports and dashboards as per the client requirements.
- Provided support and training to the business users and helped to implement enhancements to the application.

Environment: Salesforce.com platform, Apex, Visualforce Pages, Apex Explorer, Data Loader, Workflow & Approvals, Reports, Custom Objects, Custom Tabs, Email Services, Security Controls, Sandbox data loading, Informatics On demand, HTML

Application Architect - Inventica Systems Inc – Vancouver BC Feb 2010 – Dec 2012

Sreedevi Diwakarla

- Designed and developed a web-based Course management system for a hosted Course management system for a startup company called ecareerzone.com using J2EE technologies such as JSP, Servlets, Entity Beans, Session Beans, JDBC and JNDI.
- Deployed and tested the system on open source JBoss EJB container and Tomcat Servlet container.

Environment: JEE, Eclipse IDE, JSP, JBoss Application Server running on Linux OS.

Fujitsu Consulting

2000-2004

Senior Software Consultant, *Victoria BC, Canada*

Client: British Columbia OneStop Business Registry, Victoria BC, Canada

2002-2004

- Integrated Business Registration System – Provided application architecture and integration architecture to the IBRS project. IBRS helps citizens of BC to register a business in the province and spawns across multiple agencies such as BC Workers Compensation Board to successfully register a business. URL: <http://www.onestopbc.ca/>.
- This solution was built using Oracle ADF, JSP, Toplink and deployed on Oracle Application Server.

Environment: JDK 1.3, J2EE 1.2.1, JUnit 3.2, IntelliJ IDEA 2.6, JBuilder 4.0, Together 5.5, Servidium's Jaydoh Servlet Framework, Tomcat 3.2 Web Server, TopLink 2.5, Forte Conductor Engine, WinCVS 1.2, Ant 1.2, XmlSpy 3.0, WebLogic 6.0 running on Windows NT and Sun Solaris operating systems.

Client: Trans Canada Pipelines, Calgary, Canada

2000 –2002

- Responsible for designing and developing application modules, coaching and mentoring junior developers for Project Dovetail. Lead successful implementation and deployment of the Enterprise, Mainline and Alberta Contract Management modules of the Dovetail Project.
- Designed and developed on the Mainline Contracting Release 1.0 key services such as Firm Transportation, Firm Service Tendered, Storage Transportation Service, and Unapprove Request using Workflow processes defined by the Conductor. Provided support for solving critical problems in the production environment of Release 1.0 Mainline Contracting. Refactored and redesigned Business Rules Framework using design patterns, best practices and XML for Mainline Contracting.
- Worked on the design and development of Mainline Contract Management Release 1.1 - new services and enhancements for Release 1.0 services, such as Request for Contract Amalgamation.
- Worked on Alberta Contracting services such as Firm Transportation Receipt, Firm Transportation Delivery, and Interruptible Transportation Receipt using Agile methodologies.
- Designed and developed Business Rules Framework by creating the first set of business rules and validations for Enterprise, which turned out to be a difficult and significant assignment since this was the first foray into business rules. Developed best practices and guidelines for Business Rules Framework.



Sreedevi Diwakarla

Environment: JDK 1.3, J2EE 1.2.1, JUnit 3.2, IntelliJ IDEA 2.6, JBuilder 4.0, Together 5.5, Servidium's Jaydoh Servlet Framework, Tomcat 3.2 Web Server, TopLink 2.5, Forte Conductor Engine, WinCVS 1.2, Ant 1.2, XmlSpy 3.0, WebLogic 6.0 running on Windows NT and Sun Solaris operating systems.

Education

| | |
|--|-----------------|
| University of Central Florida, Orlando, Florida Major: SAS Data Mining, Graduate certificate | 08/2016-05/2018 |
| University of Central Florida, Orlando, Florida Double major: BS Business and BA Economics | 08/2014-08/2016 |

Analysis skills

- Skilled in cleaning and manipulating data within SAS, Excel, SQL queries for large data
- Experience using statistical techniques in R, SAS, Python and Excel

- Data Visualization: Skilled in created dashboards with that are visually pleasing
- Data Skills Skilled in manipulating data to find actionable insights
- SQL: SQL programming for data manipulation and queries
- Microsoft Office: PowerPoint, Word, Excel (VLOOKUP, PIVOT TABLES, D-SUM)
- Tableau, QlikView Data visualization and dashboard creation

Relevant Coursework

- | | | |
|--------------------------------|------------------|----------------------------------|
| • International Microeconomics | • Data Mining, I | • Accounting for Decision Makers |
| • International Macroeconomics | • Data Mining II | • Managerial Accounting |

Experience

Technical Analyst

Worldgate, LLC, Philadelphia, PA

June 2018 – Present

- Conduct business analysis activities by working with functional and technical stakeholders to support the functional systems, data integrations, data validation, data cleansing, testing and overall integration of data.
- Organize and facilitate stakeholder requirement sessions
- Demonstrate the ability to document, define, analyze and translate functional and non-functional business requirements.
- Lead in the development and review of requirements documents, use cases, test cases and other artifacts
- Translate business needs into requirements specifications and clearly communicate requirements to both the business and technical stakeholders
- Promote best practices in data analysis and reporting

Data Analyst Co-op

Orlando Utilities Commission, FL

May 2017 – June 2018

- Created dashboards reporting and identifying KPI's for upper management
- Collect and aggregate data from desperate sources for analysis
- Make suggestions on analysis projects feasibility and data accuracy
- Successfully oversaw the transition from excel based reporting to QlikSense for dashboards

Data Analyst Summer Intern

Orlando Utilities Commission, FL

May 2017 – August 2017

- Track KPI's and burn rates monthly using Excel
- Track process improvement goals and objectives using Visio and Excel
- Use Excel Pivot charts to create dynamic dashboards for monthly reporting of KPI's

Business Research Analyst Intern

Wendover Housing Partners Altamonte Springs, FL

August 2016 – November 2016

- Conduct effective and accurate proforma research for construction expenses
- Record and collect data using Excel and other Microsoft Office software
- Prepare and document purchasing proposals

Awards, Involvements and Achievements

- Publication Mantzaris, Alexander V., Rein, Samuel R. and Hopkins, Alexander D. *Journal of Artificial Societies and Social Simulation* 21 2018
- Eagle Scout rank, Boy Scouts of America, South Florida Council 2010

Experienced IT **PROJECT MANAGER/BUSINESS ANALYST** with experience in Education K-12, Bio-Pharmaceutical, Financial Planning/Lending, Retail, and Automotive industries. Currently pursuing MSc in IT Project Management and holds two Bachelor's Degrees in Business Administration with concentration in Business Analysis/Economics. Working experience in the field of IT Project Management, Change Management, Business Analysis and Project Coordinating.

Skills and Capabilities

- Understands the needs of the business, translating requirements into technical specifications including creating Business Requirements Documents (BRD) and Functional Specification Documents (FRD).
- Serve as liaison between business and technology departments with a history of meeting project timelines, specifications, and budgets.
- Confident communicator and relationship builder, well-practiced in business analysis, project management and change management methodologies.
- Analytical and data driven with the ability to manage new systems and processes, readily resolve problems to garner stakeholder and management buy-in at all levels.
- Excellent skills in technical writing, use case/user stories, release plans, activity diagrams and proficient in SDLC using iterative and incremental methodologies such as RUP, Agile/ Scrum methodologies.

CORE COMPETENCIES

- | | |
|---|--|
| • Change Management Processes | • Enterprise Resource Planning(ERP) |
| • Project Management - Agile, Waterfall and Six Sigma Methodologies | • Cost Benefit Analysis |
| • Project Management Office (PMO) | • Budget Administration |
| • Business Analysis | • Vendor Relations |
| • Requirements Gathering | • Data Analysis and Reporting |
| • Process & Productivity Improvement | • Knowledge of Babok & Pmbok methodologies |
| • Process Management | • Systematic Planning & Monitoring |
| • Risk Management | • Workflow Diagrams & Presentations |

PROFESSIONAL EXPERIENCE

ERP Business Analyst Consultant – Worldgate, LLC - Fulton County Schools (01/2018– Present)

- Part of a team of consultants to lead an ERP current state analysis project
- Gathered requirements by leading stakeholder meetings and interviewing ERP business stakeholders
- Developed and manage relationships business and IT stakeholders
- Generated current state ERP business process flows and developed processes for gathering functional/non-functional ERP requirements
- Work cross-functionally to determine business process relationships and owners of information while identifying the key decision makers
- Developed and provided business process documentation to the client

Project Management Consultant – Mercedes Benz IT PMO & Governance (08/2017– 10/2017)

- Responsible for leading several Business Units stakeholders, and QA resources in migration from their previous legacy IT system to the Jira Atlassian Platform, which included testing content, workflows and User Acceptance Testing (UAT).
- Tasked with working with all the business units to identify, map, clean and migrate legacy data before migration and project sundown.
- Worked on multiple projects with a goal to increase PMO efficiency using Agile and Scrum Methodologies, to ensure process optimization while creating and maintaining supporting documentation.
- Worked with the assigned Project Manager in leading the Software Development team, to transition from the current Waterfall to Agile methodology, which showed immediate results in better communication with stakeholders and cross functional teams and improved productivity.
- Responsible for creating process flows that will improve how teams complete their tasks in the new system using Jira Kanban Boards and Jira Software Development Boards for Jira software implementation.
- Developed Project Plan for the Jira Implementation to track project tasks, resources, budget and milestones using Microsoft Project 2013.
- Responsible for tracking project risks and issues and developed risk response strategies while escalating the issues to the appropriate project officials.
- Planned and led project progress meetings with the Business Units, which included stakeholders, sponsors and system users and effectively managed their expectations.
- Liaison between Mercedes Benz and an Atlassian SME company in planning and scheduling training for all Jira Champions at their location.

Business Analyst Consultant – Cobb County School District Financial Analysis Dept. – (01/2017-07/2017)

- Gathered systems requirements from the Financial Department stakeholders e.g. Accounting, Capital Projects, Payroll, Budget, and Internal Compliance, then collaborated with the Technology Department to create solutions.
- Visited other Georgia School Districts e.g. Forsythe, Bartow and communicated nationally with other School districts already using Munis Software to evaluate the efficacy, Pros and Cons of the software implementation.
- Gathered requirements from the Special Purpose Local Option Sales Tax (SPLOST) Project Management Team to evaluate if Munis Software was a viable resource for Construction Projects.
- Evaluated the current CCSD legacy systems and made recommendations to ensure it was programmed to align with the implementation of the new Munis Enterprise Resource Planning (ERP) solution.
- Participated in discussions with Tyler Technologies about current software functionality and future upgrades but most importantly reported back stakeholder requirements.
- Coordinated and led weekly IT status report meetings between the Financial, Internal Compliance and the Technology Department to provide CCSD Chief Financial Officer (CFO), Directors, Department Managers, and Business Analyst, status updates of ongoing Technology initiatives for the business systems of the School District.
- Involved in reviewing the \$6 Million budget with the designated Project Manager, CFO and Tyler Technologies to ensure the amount appropriated for the project was in line with the initial amount agreed upon e.g. for Software, Consulting, Training, Maintenance, Upgrades etc. before project launch.
- Worked directly with system users to identify gaps in processes, communication, systems or opportunities for improvement and created strategic plan for the IT Department to help resolve issues.
- Created project plan and assigned resources for Internal Compliance Department for Year End process implementation.

Sally Nzioki

- Gathered requirements from Budget and Accounts Department, and created project plan for 2018 GASB Reporting.
- In preparation for the new ERP systems launch, I was selected to attend a three-day training for the Munis System Application conducted by the Tyler Software Company in San Antonio Texas.
- Planned and coordinated all other internal and external meetings within the Financial Analysis Department.
- Tasked to research and recommend credit card vendors for a credit card initiative of which was implemented for the Financial Services Department.

Aarons Sales and Lease – Accounts Program Manager – (11/2015- 11/2016)

- Worked closely with Enterprise Program Director on planned implementations to achieve strategy and customer growth, satisfaction and retention.
- Managed all aspects of the contracts, oversaw all activities performed by the contractors and subcontractor personnel in accordance with the agreed contract requirements.
- Managed difficult and customer situations by responding promptly to their needs, soliciting their feedback back with a goal of improving customer service and reducing the potential risk of account defaults.
- Responsible for creating Business Management Project Plans, quotes, tasks including initiating, planning, executing controlling and closure of various dynamic projects.
- Responsible for Contract Management, the negotiation of purchase agreements with vendors including scope of product requirement.
- Collaborated with the Content Management teams in to plan, develop site content, style and layout including optimize content according to Search Engine Optimization) SEO.
- Conducted project scoping and planning as well as developed project management deliverables, managed project changes, resource planning, project milestone tracking and reports on project status.
- Developed, supervised, managed resources, and trained teams to deliver client projects successfully.
- Communicated with other District Program Account Executives and Sales Managers to ensure company standards for daily revenue goals were adhered to at the store level.
- Build trusting relations and consulted with clients at every level to create new business acquire information and create new business and contracts.

Quintiles, Inc. – Clinical Research Project Coordinator – (11/2012 – 10/2015)

- Performed systems data configuration as per sponsor protocol, FDA regulations and company SOP's and maintained 100% delivery of accurate and reliable data as mandated by the sponsor protocol of the clinical trials.
- Performed data request changes on ongoing clinical trial studies as per sponsor's protocol, and monitored projects from the start of database load to project completion.
- Performed validation and troubleshooting of the Library Information Management Systems (LIMS) for multiple projects.
- At the start of new trials, coordinated meetings with the business units and sponsors, i.e. Biomarker Scientific Team, Pre-Analytical, Logistics, Clinical Trials Management, Project Management and IT to discuss the database design and application programming.
- Performed systems verification and complexity checks using test plans to ensure critical specimens results triggered accurate result data after patient visits.
- Participated in Clinical Trials sponsor audits to provide accurate results data as per company policy.
- Collaborated with the Clinical Trials Management Team and the Assay Team to ensure on time delivery and routing of Trial Kits to and from the trial sites.
- Attended and contributed to project database design, project planning, and sponsor status update meetings for continuous process improvement.

Quintiles, Inc. – Information Technology Project Coordinator/Jr. Business Analyst – (7/2011-11/2012)

- Elicited requirements from impacted users for each LIMS major or minor system enhancement project and defined detailed functional and technical specifications to satisfy the business needs
- Worked in conjunction with end user leads for each department to create User Requirement Specifications Documents (URS), Business Requirements Documents (BRD), as well as collaborated with the development group to create the necessary Functional Requirement Documents (FRD).
- Assisted BA's to elicit requirements from impacted users for the Library Information Management System (LIMS) for major or minor system enhancements.
- Collaborated with the Project Managers to establish the project roadmap and feature decisions, as well as project milestones, release schedules, defining the product vision, and scope for the entire SDLC.
- Created reports, data workflows using data model processes to clarify business requirements as well enhance and re-engineer business processes prior to and in parallel with the solutions design and implementation as required.
- Responsible for reviewing User Acceptance Testing and System Test Plans
- Responsible for compiling, distributing and storing deliverables used by users, technical, business, and testing teams by providing required specification/documentation and managing stakeholder relationships through the internal SharePoint system as per company's SOP's and as required by FDA.
- Frequently used Quality Center, Service Now for defect tracking and used Jira collaboration tool to keep local and global teams informed on the progression of projects.

O.B. Tax and Financial Planning – Business Analyst/IT Project Manager – (11/2009-6/2011)

- Used Project Portfolio Management Tools to estimate and plan for a new a process for reporting company monthly finances in real time, the process in-turn saved company 55% in purchase and maintenance fees for new software and \$125K monthly in financial and man-hours.
- Responsible for reporting findings on systems functions to stakeholders as well as to finance, revenue and management departments.
- Served as liaison between business units and facilitated open lines of communication across software quality assurance, project management office and IT teams.
- Authored unambiguous user stories and verified them to a testable level of functional and non-functional requirements.
- Worked closely with finance department on financial data for budgets including accounts payable/receivable
- Collaborated with business stakeholders, senior management and other team members throughout the Systems Development Life Cycle (SDLC).
- Collaborated with finance, tax and IT departments to enhance business processes and develop new systems for reporting financial & service sales data.
- Partnered with internal departments to develop requirement specification, project scope, resource management, budget and timelines for continuous process improvement.
- Maintained records related to projects for quality, change control, scope, cost control and document revisions.
- Analyzed systems for data revenue management, sales and marketing to measure functionality and accuracy.
- Conducted process mapping and provided end user trainings on newly implemented procedures and applications.
- Developed and maintained strong relationships across internal and external teams, which included tax agencies, to proactively monitor any current changes to tax rules, trends, and mandates.

EDUCATION

Master of Science Information Technology (current 2017), Western Governors University
BSc, Business Analysis Major, American Public/Military University, West Virginia
Business Economics, Kianda/Strathmore University
Architectural Draughtsmanship, NBO Technical College
French, Alliance Française de Nairobi

TECHNICAL PROFICIENCIES

Microsoft PPM, Wireframes (certified) Visual Studio .Net, Agile, Scrum, Six Sigma/Lean Management (certified), SAP, MS SharePoint, MS Project (certified), MS Visio, Atlassian JIRA (PPM), XML/HTML, Lotus Notes, Crystal Reports, StarLIMS, Citrix, People Soft, Top Team, Oracle, MS SQL Server, Java, Service Now, Microsoft Outlook, A Database Oracle 8i, Quality Center, Visual Source Safe (VSS), Axure RP Pro 7.0. Etc.

AFFILIATIONS

International Institute of Business Analysis (IIBA), Project Management Institute (PMI), National Collegiate of Scholars Associations, Finance Club.

Ron Walker

Experience

Worldgate, LLC - SIS Trainer / School Dist. of Philadelphia, PA 9/17 – Present

- SIS Trainer for District faculty on the new Infinite Campus Student Information System.
- Demonstrated the use and functionality of the SIS and teachers and administration and training in classroom settings and one on one.
- Consulted with the Professional Development team and school district curriculum professionals on SIS training feedback and made adjustments and improved SIS training plans.

Bill & Melinda Gates Foundation - Technology Integration Consultant

Gates Proficiency Based Pathways / School Dist. of Philadelphia, PA 6/12 – 6/13

- Consulted with high school classroom teachers on integration of Pearson's Learning Management System (LMS) containing Educurious proficiency-based pilot content, and Pathbrite's e-portfolio, into classroom curriculum and instruction.
- Demonstrated the use of the LMS proficiency-based content, and the e-portfolios to high school students, and trained classroom teachers in using the same.
- Consulted with LMS content providers, and school district curriculum professionals on future directions for the piloted content.

Technology Integration Consultant

Foundations, Inc. / Educational Technology Group, School Dist. of Phila., PA Philadelphia, PA 9/08 - 6/11

- Consulted at elementary, middle, and high schools with classroom teachers on methods of integrating Interactive Whiteboards (Promethean & SMART Boards), student laptop computers, and other technology tools into curriculum and instruction.
- In consultation with teachers, demonstrated technology integration with students at the different school levels using appropriate subjects, and subject standards.
- Consulted with individual school principals, and school curriculum professionals concerning needs, desires, and directions for their school technology.
- Conducted numerous small, and large group workshops, and trainings for teachers and other education professionals on aspects of technology, and

technology integration.

Computer Science Instr./School Technology Coordinator

Roberto Clemente Middle School Philadelphia, PA 9/93 - 6/07

- Instructed comprehensive topics in computer technology to students in grades 5 through 8.

- Planned, and configured 3 networked Macintosh computer labs, 1 PC computer lab (33 computers ea. lab), 3 smaller PC labs, and assisted in the establishment of 2 New Technology Labs.
- Planned and implemented the placement of multiple computers, associated equipment, and software into each of 60 classrooms, and collaborated with classroom teachers on its effective use in the delivery of instruction.
- Defined the paid school position, and job description of "School Technology Maintenance Specialist". Trained and supervised the high school graduates who served in this full-time position.
- Delivered continuous training to teachers on integrating technology with instruction. Courses instructed included Foundations of Instructional Technology, Project-Based Learning, and Internet in the Classroom.
- School coordinator, and instructor for the Generation Yes Program from 1997 to 2006. Generation Yes is a national program based in Seattle, Wash. that trains middle and high-school students into major areas of computer technology, and then partners them with teachers to create classroom lessons that infuses technology.
- Delivered a series of 8 to 9-week classes to community adults, which introduced the computer, the Internet, and/or Microsoft Office.

Computer Science Instructor

Morton McMichael Elem. School Philadelphia, PA 9/90 - 6/93
Computer Science Educator 2nd - 8th grade.

- Operated a 19-computer networked lab. Instructed topics in computer technology to students in grades 2 through 8.
- Worked closely with other teachers encouraging the use of computers in education.
- Conducted a computer workshop series for Harcum Junior College's New Choices Program.

Grade Teacher

Various Schools - Phila. School District Philadelphia, PA 9/71 - 6/90
Teacher at K-8 and 5-8 schools, and on special assignment at Temple University. Experiences include:

- Assistant Director at Temple University of a teacher training and law enforcement career-training program. Duties included program planning, administration, recruitment, selection, and supervision of 53 interns. Maintenance of a high degree of written, and verbal communication with public school and university instructors, administrators, and supervisors was a significant requirement.

- Crisis Teacher, administrative team participant, team teaching of grades 5-8.
- Team teaching of 5-8 grade students in an At-Risk Students Program.

Education

Graduate Studies (Computer Education - 15 grad.cr)
Temple University Philadelphia, PA 12/90

Graduate Study (Computer Education - 3 grad.cr)
Philadelphia University Philadelphia, PA 8/86

Master of Education (M.Ed) (Educ. Administration)
Temple University Philadelphia, PA 12/74

Bachelor of Science (Elementary Ed.)
Temple University Philadelphia, PA 8/71

Professional Awards

Teacher of The Year Award, presented by the Philadelphia Home & School Association, May 2000

Award for Excellence in Teaching, presented by The Philadelphia Public School/Business Partnership for Reform - Nov. 1995.

Conference Presentations

College Bound Association Professional Development Retreat – Presenter, Atlantic City, NJ – May 2008

- *National Educational Computing Conference - Presenter, Philadelphia, PA - June 2005*
- *National Association for Bilingual Education - Co-presenter, Phoenix, Arizona - February, 2001*
- *Chief State School Officers' Conference - Co-presenter, Long Beach, California - April, 2000*
- *National Association for Bilingual Education - Co-presenter, San Antonio, Texas - February, 2000*
- *National Educational Computing Conference - Co-presenter, Atlantic City, NJ - June, 1999*
- *Annenberg Challenge Practitioners Challenge - Co-presenter, Snowbird Conf. Center, Utah - May, 1999*
- *National Association for Bilingual Education - Co-presenter, Denver, Colorado - January, 1999*
- *Annenberg Challenge Practitioners Challenge - Co-presenter, Houston, Texas - May, 1998*

Associated Experience

Mercer County Community College - Trenton, NJ Sep '07 – May '12
Instructor (part time) of computer technology to college bound high school students in Project SMILE/GearUP. Topics for instruction include computer theory and operation, web 2.0, search engines, Microsoft Office, webpage creation/design, and programming.

Penn State University - Abington PA campus - Nov. 1997 to April 1998 -
Dept. of Labor Studies Introduction to Computers class instructor for union members in leadership positions.

School Technology Mentor - Summer 1995 - Mentor/Instructor to teachers and parents in a School Dist. of Philadelphia program that trained participants to effectively deliver curriculum in ways that utilized computer technology.

Stephen Girard College Philadelphia, Pa - Summers 1972 to 1974 & 1977 to 1991 - Extensive yearly planning and implementation, with other staff, of an academic remediation and recreation program encompassing varied experiences for Girard students ages 8 through 18.

References

Paula R. Don, Director, Gifted and Talented Program, School District of Philadelphia, PA
215-400-4210
pdon@philasd.org

Patricia Mazzuca, Assistant Superintendent (Retired)
School District of Philadelphia, PA
pmazzuca@gmail.com

Phyllis Glassman, Project Manager, Professional Development Consultants Foundations, Inc.
glassman24@comcast.net

Wayne P. Murray, Director
SMILE/GearUP, Mercer County Community College
609.570.3156
murrayw@mccc.edu

Linda Hunter

SUMMARY

Human Resources and Professional Development professional with progressive experience managing full cycle recruiting, benefits, employee relations, compliance, employee engagement, training and HR records. Proven competencies in managing projects, solving issues and employee needs coupled with effective communication skills. Demonstrated the ability to effectively plan and execute multiple projects simultaneously to meet goals on time and in budget. Skilled at building relationships with employees across all levels of an organization. Extensive experience in variety of software tools ranging from Human Resource Information System (HRIS), Applicant Tracking System (ATS), payroll (Kronos and ADP), learning systems (LMS), and Microsoft Office suite.

Technical Competencies

HealthStream Learning Management System, Gen21 Learning Management System, Lawson, Kronos, Ultipro (EDD); MS Office (Access, Excel, Visio, Project, Word, Publisher, PowerPoint, OneNote); Adobe (Dreamweaver, Acrobat,); Quicken; IDX, Kenexa, Brass Ring, Taleo, Articulate Suite, Snag it, Able bits, Balance Trak, and ADP HR Enterprise

Certifications

HealthStream Administrator, Nashville TN
Project Management, Penn State Great Valley, Philadelphia, PA
Microsoft Project, ONLC Training Center, Philadelphia, PA

Professional Experience

WORLDGATE, LLC, Philadelphia, PA 11/2017 – Present

Professional Development & Training Coordinator

- Plan, coordinate and organize in-person and electronic training sessions and events
- Manage RSVPs to trainings, sign in sheets as well as process payment for attendees
- Support in Training activities and develop training plans
- Develop training initiatives and strategies to improve training offerings
- Maintain training documentation, Excels, and Google Drive records
- Survey employees and managers to determine training needs and desired results

SODEXO-PENN PRESBYTERIAN MEDICAL CENTER, Philadelphia, PA 08/2016 - 03/2017

Human Resources Manager 1

- Performed full cycle recruiting and on-boarding for new staff
- Facilitated internal employee job transfer process, to include creating the initial job posting, generating award letter, and assigning job to the qualified candidate following union guidelines
- Administered FMLA and Workers compensation process (200 colleagues)
- Managed employee recognition programs, ensuring employees were recognized for their efforts and accomplishments
- Tracked annual compliance
- Attended monthly union labor relations meetings

CHESTNUT HILL HOSPITAL, Philadelphia, PA 09/2015 - 08/2016

Linda Hunter

Human Resource Specialist

- On boarded new hires, performed background checks, finger printing, child abuse clearance, and entered new hires information into HRIS system ensuring that the hiring and onboarding process was seamless for candidates
- Prepared new hire orientation packets to include vital information for safety, infection control, human resources policies and other important hospital policies and procedures
- Facilitated new hire orientation on benefits, explaining all available packages, and addressing employee questions.
- Tracked and ensured all professional licenses were kept up to date in employee file and HRIS system
- Administered tuition assistance program, verified paperwork, obtained required approvals, submitted packets for reimbursement (800 staff members)

MERCY HEALTH SYSTEM, Conshohocken, PA

07/2012 - 05/2015

Learning Management System Administrator

- Seamlessly Spear-headed the transition from the Gen21 learning management system to HealthStream with no loss of service.
- Trained managers and supervisors to run compliance reports in HealthStream System.
- Supported nurse educators and subject matters experts in developing online education.
- Performed tier two help desk trouble shooting issue within the learning management system, helping managers and supervisors resolve issues for end users
- Created step by step instruction manuals for different levels of end users on the Gen21 system.

Human Resource Specialist

- Assisted applicants with pre-interview and new hires with required paperwork to ensure the application and hiring process was seamless for candidates
- Led new hire orientation on computer based learning. Verified new hires were in compliance on all on-line mandatory education

Learning Management Support Specialist

- Assisted with the validation of system fixes and enhancements and assisted with user testing, created and maintained all related processes
- Complied monthly compliance reports for the Web based and instructor-led education using various applications. Verified data was correct and distributed reports to senior leadership.

UNIVERSITY OF PENNSYLVANIA HEALTH SYSTEM, Philadelphia, PA

09/2001 - 06/2012

Penn Medicine Academy Program Coordinator

- Collected, tallied and tracked all program evaluations using Optical Scanning and Computer Support Tools. Processed program evaluations and entered data into the learning management system (Knowledge Link).
- Coordinated and supported delivery of training programs. Facilitated and equipment reservation and billing. Maintained course offering catalog and calendar. Designed and developed presentation material for educational and training programs Managed inventory, assembled and delivered program materials
- Administered the Professional Development and Tuition Assistant Programs
- Provided supervision and direction for departmental interns and volunteers.

Linda Hunter

Patient Registration Staff Assistant

- Served as timekeeper for Patient Registration department (150 colleagues), processing timesheets and adding shift differentials when applicable and submitting records to payroll.
- Created check requests and requests to purchase. Verified that all requested to purchases were accurate and within the department's budget. Tracked requests to maintain timely service and payments.

Department of Medicine Staff Assistant

- Provided Mandatory Annual Staff Training for external staff to ensure all were in compliance on the Health Systems mandatory education.
- Developed and maintained nursing licensure database. Generated reports to nurse managers regarding expiring RN licenses.
- Administered summer intern program. Processed summer interns' applications, gave regulatory mandatory education, assigned intern to department and job. Compiled information from manager and supervisor for performance evaluations at the end of the program.

Education

Bachelor's in Business Administration, Peirce College, Philadelphia, PA
Completed 61 credits towards a Bachelor's degree in Business Administration

Logan Chipkin

Experienced writer with published work that covers a wide range of subjects, including economics, history, philosophy, and science. I have formal training in physics, biology, technology and statistics.

HIGHLIGHTS

| | | |
|---|--|--|
| Published Writer Python Coder Research | Technical Writer Lecturer / Speaker Tutor | Statistics Business Analysis Mentor |
|---|--|--|

EDUCATION

ATLANTIC CITY HIGH SCHOOL, Atlantic City, NJ
 Valedictorian

UNIVERSITY OF PENNSYLVANIA, Philadelphia, PA
 Bachelor of Arts in Physics | Concentration in Business and Technology

UNIVERSITY OF HOUSTON, Houston, Texas
 Master's in Biology (Theoretical Evolution)

Relevant Coursework | Introductory Physics I & II, Calculus I-IV, Astrophysics I & II, Microeconomics, Analytical Mechanics, Wave Mechanics, Quantum Mechanics, Chinese I-IV, Mathematical Biology, Ecology & Evolution, Genetics

Technology | Can code extensively in Python

EXPERIENCE

Technical Writer | **WORLDGATE** Current

- Provide technical writing and business analysis services with the IT department to support various documentation projects and processes for The School District of Philadelphia.
- Contact: Scott Montgomery, Worldgate CCO, smontgomery@worldgatellc.com.

Tutor | **VARSITY TUTORS** Current

- Tutor online in subjects such as calculus, physics, economics, statistics, and IB Mathematics. I have taught both high school and college students who have submitted positive reviews following our sessions.
- More information about the company can be found here: <https://www.varsitytutors.com>.

Tutor | **IVY EXPERIENCE** Current

- Tutor high school students both online and in-person. I prepare students for standardized tests such as the SAT, ACT, and SAT subject tests. I have also helped students with algebra, biology, and calculus.
- Contact: James Wismer, jim@myivyexperience.com.

Researcher/Instructor | UNIVERSITY OF HOUSTON, Houston, TX 2017-2019

- Research was focused on applicability of branching processes to asexual populations that are mathematically guaranteed to go extinct. We considered asexual populations that were reproducing below replacement rate such that eventual extinction was inevitable. We compared our theoretical model's prediction of extinction time for populations and compared them to results from simulations of those populations. We then calculated statistics on our simulated data such as coefficient of variation of extinction time and mean extinction time.
- The preprint of our manuscript can be found here:
<https://www.biorxiv.org/content/early/2018/10/22/448563>.
- Taught Biology Lab to undergraduate students, which included both lecture and experimental components. Topics included evolution, acids & bases, the scientific method, ecology, genetics, and selection & genetic drift.
- Assisted graduate students in editing grant proposals, scholarship applications, and dissertation proposals.
- Ran the Epistemology Club, in which we discussed the logic of the scientific method once a week.
- Contacts: Ricardo Azevedo, razevedo@central.uh.edu & Ana Medrano, aimedran@central.uh.edu.

Business Analyst | UBS WEALTH MANAGEMENT, Weehawken, NJ 2015 - 2017

- Executed against technology roadmaps for Executive Compensation Plan Administrative Services.
- Contact: Tom Grande, Tom.grande@jpmchase.com

Staff Assistant | University of Pennsylvania, School of Nursing, Philadelphia, PA 2013 - 2015

- Developed nomination and selection processes for an award in global women's health, supported the planning of several large-scale events focused on urban health, developed a plan for capturing and tabulating important information for various assignments, made calls to and interacted with high-level donors and alumni, and provided tours of campus for a number of potential students at the request of donors and friends to the school.

PUBLISHED WORK

Writer/Contributor Current

- Wrote and published a fantasy novel, *Heart of Ice*, in 2010.
- Write articles/interviews for several publications including *Quillette*, *Merion West*, *Areo*, and *Arc Digital*. Articles focus on philosophy, economics, history, and science.
- Articles republished with *RealClearScience* and *The Genetic Literacy Project* - specified below.

Science

- Book review of *The Ape That Understood The Universe* at *Areo*, February 11th, 2019.
- Article entitled "The Evolution of Knowledge" at *Arc Digital*, March 20th, 2019, and *RealClearScience*, March 21st, 2019. Article explains how knowledge is acquired, how it grows, and why it is the key to understanding the parallels between biology and economics.
- Article entitled "People, Memes, and the History of Evolution" at *Areo*, April 1st, 2019. Article argues that the evolution of people and their ideas is more significant in the history of evolution on Earth than others have argued.
- Interview with Dr. Steve Stewart-Williams at *Quillette*, May 14th, 2019. Discussed the origin of sex differences and the consequences for culture and psychology.
- Book review of *Infinite Powers* at *Merion West*, May 14th, 2019.

Logan Chipkin

- Interview with Dr. Lewis Dartnell at *Quillette*, May 30th, 2019, and *The Genetic Literacy Project*, June 24th, 2019. Discussed how the history of Earth itself impacted the history of human civilization, and humanity's current efforts to discover aliens.
- Interview with Dr. Graham Farmelo at *Areo*, September 7th, 2019. Discussed the relationship between mathematics and physics, and the history of those who study each of them.

Philosophy

- Article entitled "Open Ideas" at *The Libertarian Institute*, October 15th, 2018. Article argues for the importance of free speech.
- Article entitled "The Mirror Test" at *Merion West*, May 21st, 2019. Article discusses a method by which to evaluate a particular class of philosophies.
- Article entitled "Dogma Is Not Confined to the Cathedral" at *Areo*, July 4th, 2019. Article argues that dogmatic thinking can be found anywhere, beyond where it is intuitively thought to exist.
- Article entitled "In Celebration of Errors" at *Quillette*, August 28th, 2019. Article argues that errors are not only inevitable, but are crucial in our ability to improve upon our understanding of the world.

Economics

- Article entitled "Do Not Fear innovation and Automation" at *The Libertarian Institute*, November 5th, 2017. Article argues that automation is a net gain for the economy.
- Interview with Dr. Ben Burgis at *Merion West*, June 12th, 2019. Discussed strengths and weaknesses of political ideologies, both left and right.
- Article entitled "The Nature of Economics" at *The Libertarian Institute*, June 17th, 2019. Article discusses the fundamental principles of economics, and how they are derived.
- Book review *Big Business* at *Merion West*, June 23rd.

History

- Article entitled "Five Lessons From the Trial of Socrates" at *Areo*, March 1st, 2019. Article explores lessons we might learn from the punishment of the famous ancient philosopher, Socrates of Greece.
- Science history article entitled "From Disgrace and Death to Revolution and Reverence" scheduled to be published in *History Magazine* in February/March 2020. Article explores the tragic fate of the founder of the field of thermodynamics, who never lived to see his ideas vindicated.

Pricing

Harris County Department of Education

Component C- Business Analyst and Process Consultant Services Pricing

(Services rates listed below are not to exceed rates.)

| Service Category Description | Fee Per Service | Fee Per Service – Including Full Time Travel | Unit of Measure (hour, day, project, etc.) |
|--|-----------------|--|--|
| Project Manager Consultant with 10 + years of Experience | \$185 | \$215 | Hourly |
| Project Manager Consultant with 5 + years of Experience | \$165 | \$195 | Hourly |
| Project Manager Consultant with 3 + years of Experience | \$115 | \$155 | Hourly |
| Business Analyst/ Business Process Redesign Lead/ Integration Consultant with 10 + years of Experience | \$160 | \$190 | Hourly |
| Business Analyst/ Business Process Redesign Lead/ Integration Consultant with 5 + years of Experience | \$125 | \$155 | Hourly |
| Business Analyst/ Business Process Redesign Lead/ Integration Consultant with 3 + years of Experience | \$85 | \$115 | Hourly |
| Change Management Lead | \$189 | \$219 | Hourly |
| Lead Trainer/ Training Developer with 10+ years of experience | \$185 | \$215 | Hourly |
| Trainer / Training Developer with 5+ years of experience | \$125 | \$155 | Hourly |
| Trainer with 3+ years of experience | \$85 | \$115 | Hourly |
| Technical Writer with 10+ years of experience | \$115 | \$135 | Hourly |
| Technical Writer with 5+ years of experience | \$95 | \$125 | Hourly |
| Technical Writer with 3+ years of experience | \$75 | \$105 | Hourly |