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Disaster Recovery Financial Management & Reimbursement Services Detailed Capabilities Statement

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PVMA, LLC is an Affiliate of
Disaster & Humanitarian Services, a
501(c)(3) Nonprofit NGO



Harris County Department of
Education
Choice Partner Contract No.
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**Grant Management and Reimbursement Compliance Services
FEMA Individual Assistance**

From 2007 to 2011, the PVMA team has provided grant management and reimbursement compliance services on behalf of public entities following several disasters under FEMA’s Individual Assistance - Disaster Case Management (“DCM”) program. Our team has managed the delivery of services to over 40,000 families that participated in the DCM program funded by FEMA following Hurricanes Katrina, Rita, Ike and Gustav.

Our team managed 10 subcontracted social service organizations that provided DCM services to the program families in Texas and 41 other states and U.S. Territories. Our team provided DCM program oversight services that included, but not limited to:

- Financial and Grant Management
- Accounting and Accounts Payables
- Forecasting and Cash Flow Drawdowns
- Reimbursement Management
- Quality Assurance and Compliance
- Audit Preparation and Documentation Management

Past Performance Experience

Client(s): City of Houston
Harris County Housing Authority
Housing Authority of New Orleans
Greater New Orleans Housing Authorities
Memphis Housing Authority

Contract: Disaster Housing Assistance Program – Emergency Housing and Case Management Services

Dates: September 2007 – December 2011

Services Provided: Program Management, Case Management, Vendor Management, Grant and Financial Management

Members of the PVMA team provided overall Program Management services for the FEMA/HUD established Disaster Housing Assistance Program (“DHAP”) for four clients in multiple-states and locations

**Grant Management and Reimbursement Compliance Services
FEMA Public Assistance**

In addition, the PVMA team provided disaster recovery financial and reimbursement management to the largest integrated medical system in Texas. The University of Texas Medical Branch Galveston (“UTMB”) outsourced its operations to gain financial reimbursement from FEMA and private insurance companies for the cost of rebuilding UTMB facilities following Hurricane Ike.

Our team provided several services that include, but not limited to:

- Grant accounting
- Financial Reporting
- Documentation Management
- FEMA Project Worksheet Development
- Financial Forecasting
- Accounts Payable and Invoice Compliance
- Federal Procurement Compliance
- Contract Management and Performance
- Vendor Management
- Resource Management
- Audit Preparation

Our team of 25 professionals was deployed to UTMB for 5 years to manage the operations of this financial management and FEMA reimbursement project.

Past Performance Experience

Client: University of Texas Medical Branch Galveston
Contract: Grant Administration, FEMA Reimbursement, and Financial Operations
Dates: November 2010 – May 2015
Services Provided: Grant Management, Financial Forecasting, Reimbursement Services, Documentation and Records Management

Our Key Personnel

Program Management Lead

Laurie A. Robinson, MBA, is the managing principal for Project and Vendor Management Advisors, LLC (PVMA, LLC) located in Houston, Texas. Ms. Robinson has over twenty-two years of large-scale program and project management, regulatory compliance, internal audit, government affairs and policy experience in the healthcare, housing, and disaster management and recovery industries. Her

experience comes from holding positions at the Office of Inspector General for the Department of Health and Human Services, Ernst & Young's National Health Science Advisory Services Practice, Prudential Insurance Company of America, and two other accounting and consulting firms.

Since 2005, Ms. Robinson has managed over \$2.5 billion dollars in federal grant funds as the project director and then project principal for several housing, social service, and disaster management projects sponsored by federal, state and local government agencies. Such agencies included, but not limited to the Federal Emergency Management Administration (FEMA), Housing and Urban Development (HUD), the Department of Health & Human Services, the City of Houston, Harris County Housing Authority, and the largest academic integrated healthcare delivery system in Texas.

Ms. Robinson has gained expertise in several regulatory areas including FEMA's Public Assistance and Individual Assistance Programs, HUD's Community Block Grant Development-Disaster Recovery, and HHS' Medicare and Medicaid Programs. She concentrates her efforts in the areas of financial reimbursement, grant management, and program compliance.

Prior to becoming the Managing Principal for PVMA, LLC, Ms. Robinson was the lead principal for a Houston-based accounting and consulting firm where she led the firm's Consulting and Advisor Services Practice for the Houston, New Orleans, and Washington, DC offices. During this time she managed several disaster housing and disaster recovery projects across the country, a Medicare and Medicaid fraud unit, and FEMA reimbursement and accounting projects.

From 2005 to 2011, Ms. Robinson led the project management, internal audit and external audit preparation for the City of Houston during its Hurricane Katrina and Rita emergency housing program developed for and resulting from one of the nation's largest national disaster in recent history. Such services included project management, internal audit, and FEMA compliance services. She continued the same type of services after Hurricane Ike, where she led and managed six disaster housing assistance programs (DHAP) and two national programs for several housing authorities. She and her team assisted over 60,000 families displaced by the Hurricanes with housing, rental payments, and social service case management.

Prior to 2005, Ms. Robinson served as the Legislative and Regulatory Liaison for the Office of Inspector General (OIG), Department of Health and Human Services in Washington, D.C., where she conducted day-to-day legislative and regulatory policy activities and initiatives on behalf of the inspector general. During this time she provided technical assistance to the United States Congress and other government agencies concerning auditing requirements for Medicare Part D, Medicaid, Medicare Advantage, and the State Children's Health Insurance Program (SCHIP).

Prior to the OIG, she was a Senior Manager with Ernst & Young LLP in its national Health Sciences Advisory Services practice since its initiation in 1998 for both the Houston and Washington, DC offices. Ms. Robinson was also a legal analyst and regional associate compliance manager for Prudential Insurance Company of America where she assisted in the development and implementation of its nation-wide healthcare legislative and regulatory tracking process and Central Region's Compliance Program. Her educational experience includes a BA from the University of North Texas, a post-baccalaureate certificate in advanced legal studies, and a MBA from the University of St. Thomas in Houston, Texas.

Laurie received a Letter of Commendation from the City of Houston for her Hurricane Katrina Audit Preparation and Reimbursement Recovery Project work.

Financial Management Lead

Jeffry R. Helton, PhD, CMA, CFE, FHFMA is a project director with over 25 years of diverse experience in healthcare finance. As a Certified Management Accountant, a Certified Fraud Examiner, and a Certified Healthcare Financial Professional, he has the proven ability to organize healthcare facilities and restore positive financial results. As a former Chief Financial Officer in the healthcare industry, Jeff specializes in fraud auditing, reimbursement, internal audits, healthcare operations, and large scale project management leadership. Jeff is a subject-matter-expert for hospitals, managed care organizations, and government healthcare agencies.

Prior to joining PVMA, Dr. Helton was a director in MFR, P.C.'s Consulting and Advisory Services practice where he directed engagements in the healthcare and consulting practices. Prior to MFR, Dr. Helton was an engagement manager for Jefferson Wells International where he managed several healthcare and disaster management projects. Dr. Helton worked with Blue Cross/Blue Shield of Louisiana (BCBSLA) immediately after the Hurricane Katrina disaster in 2005. His team assisted the BCBSLA team in developing procedures to maintain claim and premium billing records that were compromised during the hurricane. He designed and developed contingency procedures that allowed BCBSLA to maintain an accurate accounting of enrollment, premium receivables/collections, and claim payments during a time when normal mail services for premiums and claims were severely curtailed in the New Orleans vicinity. These procedures were used to manage over \$70 million in commercial and Medicare Supplement premium receivables and \$55 million in claim payments in the 120 days following Hurricane Katrina.

The procedures used to develop contingency plans for BCBSLA during the aftermath of Hurricane Katrina were built off of the experience of our team's Associate Director - Dr. Jeff Helton - during his work as CFO of Humana Health Plan South Florida in the wake of the Hurricane Andrew disaster of 1992. In that experience, he developed and implemented backup procedures to maintain timely and correct premium billings, capitation payment and accounting, payroll and supply invoice accounting, cash management, and claims adjudication procedures. These procedures became a model contingency plan for Humana affiliates at that time, maintaining accurate accounting records for Medicare HMO and Florida Managed Medicaid beneficiaries after Plan offices were damaged following Hurricane Andrew.

Jeffery R. Helton earned his PhD in Healthcare Management at the University Of Texas School Of Public Health. He received his Master's in Health Administration from the University of Alabama at Birmingham and Bachelor of Business from Eastern Kentucky University. Jeff is the author of several publications including Performance Normalization Using Data Envelopment Analysis, The Current State of Finance and Accounting Management in the Healthcare Industry.

Documentation Management Lead

Tara DeAndrea, RHIA is a Senior Program Manager for Project and Vendor Management Advisors, LLC ("PVMA") located in Houston, Texas. Tara has over 16 years of large-scale program and project management, regulatory compliance, internal audit, and reimbursement accounting and forecasting experience in the healthcare and disaster recovery industries.

Tara is a record and documentation expert and has designed and implemented record management projects for HUD, FEMA, HHS, City of Houston, and UTMB involving over 20 million documents both in hard copy and electronically. She has managed records for audit preparation and project close-out procedures in the disaster recovery industry since 2005 and in the healthcare industry since 1998.

Since 2005, Tara has managed over \$2.5 billion dollars in federal grant funds as the project manager and senior manager for several housing, social service, disaster recovery projects awarded by federal, state and local government agencies, and through interagency agreements. Tara has managed several disaster recovery projects across the country and U.S. Territories, which includes state, federal and private insurance reimbursement, grant management, accounting, financial forecasting, audit preparation, and project closeouts under FEMA's Public Assistance (PA) and Individual Assistance (IA) Programs, and HUD programs including CDBG-DR, URA, HOME, HCV and DHAP.

Tara is a member of American Health Information Management Association, the Texas Health Information Management Association, the Executive Board Member of Houston Area Health Information Management (President, 2005-2009), and a Member of The Greater Houston Partnership subcommittee: Healthcare Emerging Issues. She graduated from the University of Texas Medical Branch, Galveston, Texas with a B.S. in Health Information Management, 1996, and earned Registered Health Information Management accreditation, 1997, Registration number: 0566934.

Tara received a Letter of Commendation from the City of Houston for her Hurricane Katrina Audit Preparation and Reimbursement Recovery Project work.