

Corporate Portfolio Management Solutions (CPMS)

Capabilities Briefing



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Corporate Portfolio Management Solutions

Top NAICS Codes:
541611, 541512, 541519

DUNS Number: 196157601
Cage Code: 457X9

SBA 8(a) Certified Business
SBA HUBZone Certified Business



CPMS CAPABILITIES BRIEFING



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Corporate Portfolio Management Solutions

Company Overview



Founded in 2005 by Mr. Terry Tomlinson, Corporate Portfolio Management Solutions (CPMS) providing financial management consultation services and solutions to Federal Agencies and Healthcare organizations.

Mr. Tomlinson is an accomplished management consulting services leader with over 20 years of professional services experience supporting financial management, information technology and healthcare engagements.

CPMS is an award-winning company, and in 2015, was awarded the HUBZone of the year award from the United States Department of Agriculture (USDA), Departmental Management (DM) for software development, analytics, and program management.



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Contract Vehicles



- SBA 8(a) Certified Firm: #305343
- SBA HUBZone Certified: #49324
- 8(a) STARS II Governmentwide Acquisition Contract (GWAC): Prime Contract Holder – Contract No. GS00Q17GWD2213
- Seaport-e: Subcontractor to Telesis Systems, Inc. – Contract Number: N00178-16-D-9073
- Army Aviation and Missile Command (AMCOM) Expedited Professional and Engineering Support Services (EXPRESS – Team Member to Delta Solutions & Strategies, LLC.



NAICS Codes



- 541611 – Administrative and General Management Consulting Services
- 523920 – Portfolio Management
- 541219 – Other Accounting Services
- 541330 – Engineering Services
- 541511 – Custom Computer Programming Services
- 541512 – Computer Systems Design Services
- 541513 – Computer Facilities
- 541519 – Other Computer Related Services
- 541612 – Human Resources Consulting Services
- 541613 – Marketing Consulting Services
- 541618 – Other Management Consulting Services
- 541690 – Other Scientific and Technical Consulting Services
- 541990 – Other Professional, Scientific, & Technical Services
- 561110 – Office Administrative Services
- 561320 – Temporary Help Services
- 561499 – All Other Business Support Services
- 611430 – Professional and Management Development Training
- 611699 - All Other Miscellaneous Schools and Instruction
- 611710 – Educational Support Services
- 624310 - Vocational Rehabilitation Services



Capabilities – Financial Management



- Activity Based Costing (ABC)
- Budget Formulation, Execution & Monitoring
- Budget Reduction Analysis
- Business Case Development & Analysis (OMB-53 & OMB-300)
- CFO Act Audits and Advisory Services
- Cost Benefit Analysis (CBA)
- Cost Estimation
- Due Diligence Support Services
- Financial Systems Reporting
- Financial Compliance
- Financial Modeling
- Finance & Performance Audits
- Fleet Management, Operations & Policy
- Fraud, Waste & Abuse (FWA)
- Independent Risk Analysis
- Gap Analysis
- Generally Accepted Accounting Principles (GAAP) Analysis
- Financial System Modernization & Planning
- Internal Controls
- Performance Measurement
- Planning, Programming, Budgeting, and Execution (PPBE)
- Statistical Analysis



Capabilities – Information Assurance



- Audit Review & Verification
- Application Security Test & Evaluation (ST&E)
- Application Validation
- Data Assurance / Data Quality / Error Detection
- Federal Information Security Management Act (FISMA) Support
- Incident Prevention Modeling/ Cyber Exercise
- IT Security Policy
- IT Security (INFOSEC) Training
- Log Management & Review
- Security Assessment and Authorization
- Systems Disaster Planning & Recovery
- Vulnerability Assessment



Capabilities – Information Management



- Artificial intelligence (AI)
- EMR/EHR Strategy & Planning
- Enterprise Architecture (EA)
- Data Analytics & Business Intelligence
- Data Governance
- Data and Statistical Analytics
- Data Management
- Fraud, Waste & Abuse (FWA)
- Health Systems Informatics and Interoperability
- IT Governance
- Independent Verification and Validation (IV&V)
- Predictive Modeling
- Systems Analysis and Implementation
- Technology Assessments and Validation
- Medicaid & Medicare Compliance
- Policy Evaluation and Implementation
- Risk Management
- Strategy and Planning
- Website Development and Maintenance



Capabilities – Human Capital Management



- Administrative Management
- Benefits Assessment
- Change Management
- Employee and Labor Relations
- Data Management
- Organizational Development
- Personnel Processing
- Position Classification
- Recruitment and Internal Placement
- Reduction-In-Force
- Strategic Planning
- Training
- Workers Compensation



Clients



- AT&T
- Bureau of Alcohol, Tobacco, Firearms, and Explosives (ATF)
- Centers of Medicaid and Medicare Services (CMS)
- Consumer Financial Protection Bureau (CFPB)
- Department of Education (ED)
- Department of Energy (DoE)
- Federal Highway Administration (FHWA)
- General Services Administration (GSA)
- Metropolitan Atlanta Rapid Transit Authority (MARTA)
- Pension Benefit Guarantee Corporation (PBGC)
- United States Department of Agriculture (USDA)



Past Performance



Metropolitan Atlanta Rapid Transit Authority (MARTA)

IT Infrastructure and Application Audit

- Evaluated current licensing agreement with Oracle for the Enterprise platform
- Optimized the use of the Oracle Enterprise platform to automate department functions for accounting, procurement, and various operations
- Provided recommendations for expanding the use of the Oracle Enterprise platform



Past Performance



AT&T

IT & Business Strategy and Program / Portfolio Management for U-verse mobile and desktop projects for Home Solutions and eCommerce Support Services

- Manage and provide project management support for the development of multiple mobile application development projects and teams.
- Personalize the user experience using IBM Big Data and Analytics for AT&T optimized mobile web and native applications
- Provide IT governance and process improvement strategy for IT PMO.
- Provide business strategies for AT&T consumer experience initiatives to increase CSAT scores.
- Provide project scope and funding projections for project development.



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Past Performance



Bureau of Alcohol, Tobacco, Firearms, & Explosives (ATF)

IT Capital Planning & Investment Control (CPIC), Enterprise Architecture & Program Management Services

- Provide Senior Level Expertise and Consulting.
- Provided Budget Formulation and Execution Services.
- Provided Business Case Support.
- Program Management & Planning
- Provided IT Capital Planning and Investment Control (CPIC) Support.
- Provided Enterprise Architecture (EA) Support.
- Assist with Departmental and Office of Management and Budget (OMB) Data Calls.



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Past Performance



Bureau of Alcohol, Tobacco, Firearms, & Explosives (ATF)

Cyber Security / Information Assurance

- Provide Certification & Accreditation (C&A) Services
- Provide Contingency Planning Management Services
- Disaster Recovery and Business Continuity
- Federal Information Security Management Act (FISMA) Support
- Incident Prevention Modeling / Cyber Exercise
- IT Security (INFOSEC) Training
- Penetration Testing
- Security Test & Evaluation (ST&E)



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Past Performance



Centers for Medicare & Medicaid Services (CMS)

Medicare Advantage, Medicaid and Marketplace Program Advancement Contract (MPAC)

- Provide data analytics, technical, statistical services to support the Medicaid Managed Care Risk Adjustment Validation (RADV) Program
- Provide Medicare technical and program assistance.
- Improve the efficiency of medical record submissions and review processes.
- Develop, evaluate, and implement statistical approaches and methodologies for Part C, Part D, Marketplace fraud analysis, and Medicaid Managed Care Risk Adjustment Validation (RADV) activities.



Center for Medicare
and Medicaid Services



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Past Performance



Centers for Medicare & Medicaid Services (CMS)

Provide consulting services to support the Healthcare Integrated General Accounting System (HIGLAS) Program Management Office

- Provide Independent Verification & Validation (IV&V) Services to the CMS HIGLAS PMO.
- Provide Earned Value Management (EVM) analysis on Development, Modernization or Enhancement (DME) activities.
- Provide IT Capital Planning & Investment Control (CPIC) Services.
- Provide Project Management services.
- Provide Risk Management services.



Center for Medicare
and Medicaid Services



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Past Performance



Consumer Financial Protection Bureau (CFPB)

Provide IT consulting services to support the Technology and Innovation (T&I) Division

- Federal Information Technology Acquisition Reform Act (FITARA) consulting and implementation services.
- Develop and update the Bureau's FITARA Scorecard on a semi-annual basis.
- Conduct ongoing analysis across the technology portfolio to assess implications of ongoing capital and operations and maintenance costs for technology investments across the Bureau. Inform the technology roadmap and long-term planning efforts.
- Develop project tracking and performance measurement processes including project dashboards and other best practices as part of the overall project governance and investment framework.
- Employ federal government and industry-recognized strategies to assist with development of business cases, cost benefit analysis, return on investment analysis, total cost of ownership analysis, project/program costing and tracking for new and existing projects.
- Develop monthly, quarterly, and annual performance metrics to track how well the Bureau's Technology and Innovation (T&I) Division is doing with incremental development activities; tracking of project risks, data center consolidation and data migration to the Cloud; and project cost savings.
- Develop modeling capabilities, trending and forecasting analysis within Tableau.



Consumer Financial
Protection Bureau



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Past Performance



U.S. Department of Education (ED)

IT Capital Planning & Investment Management Support Services

- Provided Independent Verification and Validation (IV&V) services for the development of the MSIX.
- Complete Migrant IT Investments business case and OMB 300/53 submissions.
- Complete the Migrant IT Investments monthly and quarterly data calls for project schedule, cost, and risk updates.
- Complete requests for Migrant IT Investments information for the Department's Select and Control phases during the ED Capital Planning Process.
- Develop Baseline Change Request (BCRs).
- Provide EVM Analysis on any Development, Modernization or Enhancement (DME).



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Past Performance



U.S. Department of Energy (DOE)

Human Capital Management

Provide Human Capital Management services in the following areas:

- Strategic Planning
- Employee Assessments
- Workforce and Succession Planning
- Employee and Labor Relations
- Data Management
- Organizational Development
- Personnel Processing
- Position Classification
- Recruitment and Internal Placement
- Reduction-In-Force
- Training



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Past Performance



Federal Highway Administration (FHWA)

Development of the Accomplishment Report of the 2016 Disadvantaged Business Enterprise (DBE) Academies.

- Provide review of DOT FHWA evaluation forms for each DBE Academy.
- Analyze the DOT FHWA DBE Academy evaluation data to show number of participants and their level of knowledge before and after the training of each of the nine (9) program topics.
- Provide graphic design services.
- Provide report in hard copy format (200 copies) and in a soft copy format, that is 508 compliant.



U.S. Department
of Transportation

**Federal Highway
Administration**



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Past Performance



U.S. General Services Administration (GSA)

Providing Senior Assessment Management services to the Office of Portfolio Management

- Provide appraisal and valuation services.
- Provide prospectus development and management services.
- Creates complex models to support effective Portfolio / Real Property Asset Management in the National Capital Region (NCR).
- Asset management support in the lease formulation plan including lease consolidation analysis.



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Past Performance



Pension Benefit Guaranty Corporation (PBGC)

IT Security Support Services

- Contingency Planning Management Services
- Disaster Recovery and Business Continuity
- Federal Information Security Management Act (FISMA) Support
- Incident Prevention Modeling / Cyber Exercise
- IT Security Policy
- Penetration Testing
- Security Assessment and Authorization (SA&A)



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Past Performance



U.S. Department of Agriculture (USDA)

Internal Controls, Analysis and Auditing, Fraud and Abuse

- Provide internal controls, analysis and auditing services to identify potential fraud and abuse of USDA Fleet Management Credit Cards.
- Conduct comparison of current fleet card usage and the standardized practices and acceptable measures of compliance per OMB Circular A-123 management controls, policies, and practices for ensuring appropriate charge card usage.
- Assess overall strengths, weaknesses, and best practices currently used by USDA.
- Develop Transitional Development Plan for the migration to a new USDA Fleet Card system.



Our Values



High level of customer service - We execute our activities with integrity and an uncompromising spirit of customer advocacy and commitment. We believe in service beyond expectation, achieved through a constant desire to anticipate and fulfill evolving customer needs.

Integrity – The firm was created with the vision of changing the nature of consulting by setting a new standard for commitment, trust and execution. We are built on the principle that doing the right things for our clients and our people always comes first.

Innovation – Our methodology brings focus to critical areas through the lens of the financial manager. Compliance and oversight is our primary focus, with tangential expertise in overlapping areas. Our goal is to identify problem areas and offer corrective solutions and implementation. Our customer focused approach is tailored specifically to each customer’s requirement.

Trusted Advisor - Independent thinking and straight talk are the foundation of our “trusted advisor” role. We have become a trusted advisor to many of our clients.

Emphasis on Professional Excellence - We identify and recruit individuals with a sharp eye for detail and a passion for the customer’s needs.

Our Values



Small Business Culture, Large Business Experience – CPMS is defined by a small business culture with full accessibility to our chief decision makers, dedication to customer satisfaction, and a company that is small and agile enough to keep up with any changing environment. We also offers a team of professionals who have tenured experience with the processes and procedures that have made many large businesses successful. This fusion of the two allow our customers to experience the best of both worlds in one company.

Understanding the Requirements – CPMS understands that a strong understanding of the requirements is key to the success of any initiative. We take the time to interface with our clients and develop a thorough understanding of their wants, needs, goals, and hot buttons in order to deliver the best possible solution.





Contact Us

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