

# Corporate Portfolio Management Solutions (CPMS)

## Capabilities Briefing



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Top NAICS Codes:  
541611, 541512, 541519

SBA 8(a) Certified Business  
SBA HUBZone Certified Business

# Company Overview



- Headquartered in Washington, D.C.
- DUNS Number: 196157601
- TIN: 11-3757456
- Cage Code: 457X9
- SBA 8(a) Certified Firm: #305343
- SBA HUBZone Certified: #49324
- Highly accountable and customer-focused



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# 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
- 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



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# Introduction



CPMS is a professional services firm specializing in:

- Financial Management
- Cyber Security
- Information Management
- Human Capital Management

CPMS provides consultation services and solutions to Federal Agencies and Healthcare organizations. We are committed to understanding business challenges from our clients' perspective and providing talented professionals that will deliver tangible results.



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# Contract Vehicle – GSA 8(a) STARS II GWAC



## 8(a) STARS II Governmentwide Acquisition Contract (GWAC): Prime Contract Holder – Contract No. GS00Q17GWD2213

The 8(a) STARS II GWAC is designed to promote small business utilization when purchasing information technology (IT) services or IT services-based solutions for the federal government. The 8(a) STARS II program is reserved exclusively for qualifying certified 8(a) small business concerns as the prime contractors per Federal Acquisition Regulation (FAR) 19.8.

The benefits of 8(a) STARS II to utilizing agencies include the following:

- 8(a) socioeconomic credit transferrable to the agency
- Pre-competed, easy to use contracts
- Access to proven 8(a) small business technology providers
- Shortened procurement lead time
- Directed Order Authority: Directed task orders up to \$4 million each are allowed for federal civilian and Department of Defense activities
- A low user access fee (0.75 percent) built into contractor's ceiling prices



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# Contract Vehicle – NAVSEA Seaport-e



## Seaport-e: Subcontractor to Telesis Systems, Inc.

CONTRACT NUMBER: N00178-16-D-9073

CONTRACT CEILING: \$53 billion

PERIOD OF PERFORMANCE DATE: 04/05/2004 to 04/04/2019

PAYMENT TERMS: 0% Net 30 days- Prompt Payment Terms

### ABOUT NAVY SEAPORT-E:

To meet Seapower 21 objectives and to increase efficiency, the NAVSEA Warfare Centers established the SeaPort Enhanced (SeaPort-e) Multiple Award Contract (MAC) vehicle, using a web-based, e-business procurement portal, to facilitate performance-based service acquisition, leverage buying power, improve business intelligence, and reduce cycle time.

### CONTRACT FEATURES:

Firm Fixed Price and Cost Reimbursable task orders

No fee for authorized users

Unlimited small or large business partners

Once-a-year rolling admission period to award new prime contracts



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# 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



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# Capabilities – Information Assurance



- Audit Review & Verification
- Application Security Test & Evaluation (ST&E)
- Application Validation
- Certification & Accreditation (C&A)
- 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
- Systems Disaster Planning & Recovery
- Vulnerability Assessment



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# Capabilities – Information Management



- 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



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# 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



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# Clients



- AT&T
- Bureau of Alcohol, Tobacco, Firearms, and Explosives (ATF)
- Centers of Medicaid and Medicare Services (CMS)
- 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)



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# 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



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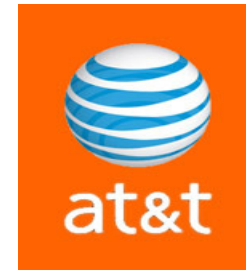
# Past Performance



## 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)

### 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



## 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.



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# 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.



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# 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.



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# Contact Us

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