

Action/Information Item

Audit Committee

Approval for the Request for Proposal for Consultant for Roles and Responsibilities for the Commission's Loan Program

The April 2006, Bureau of State Auditors (BSA) report found that "Student Aid and EDFUND do not agree on the appropriate role each should have in the administration of the FFEL Program." BSA recommended that "Student Aid should ensure that the roles and responsibilities it delineates for itself and EDFUND do not inappropriately cede its statutory responsibilities to EDFUND."

As a result of the BSA finding and recommendation, at its June 23, 2006 Meeting, the Commission directed staff to move forward to develop a request for proposal (RFP) for consulting services to assist the Commission in delineating the CSAC and EDFUND roles and responsibilities for the loan program.

At the July 26, 2006 Joint CSAC/EDFUND workshop, the Commission provided additional clarification regarding the scope of the RFP. CSAC staff is finalizing the draft RFP which incorporates EDFUND staff and Commissioner suggestions. The draft RFP will be sent under a separate cover.

The RFP will be presented to the Commission for approval at the Special Commission meeting, August 21, 2006.

As directed by the Commission, CSAC staff is following the State process using the California Multiple Award Schedules (CMAS). Enclosed is a partial list of CMAS business consultants to whom the RFP can be sent.

Staff will provide a status update at the meeting.

Recommended Action: Approval of the RFP for consultant for the roles and responsibilities for the Commission's loan program.

Responsible Staff: Janet McDuffie
Chief, Management Services and
Acting Chief, Federal
Policy & Programs

CALIFORNIA MULTIPLE AWARD SCHEDULES				
BUSINESS CONSULTANTS - ORGANIZATIONAL ASSESSMENT				
FIRM	LOCATION	PROFILE	SERVICES OFFERED	BUSINESS TYPE
Alffer Consulting	San Diego, CA	Alffer Consulting helps its clients' management plan and develop system-wide changes to improve the organization's performance.	<ul style="list-style-type: none"> • Performance Audits • Activity-Based Costing • Process Reengineering • CA (A76) Studies • Performance Standards • Strategic Planning • Meeting Facilitation • Focus Groups • Surveys 	Large
Cambria Solutions, Inc.	Sacramento, CA	Specializing in public sector, private sector and non-profit expertise, Cambria Solutions focuses on core competencies, strategy and operations and information technology.	<ul style="list-style-type: none"> • Business Strategy and Planning • Operations Review • Requirements Definition • Cost-Benefit Analysis • Feasibility Studies • Best Practice Assessments • Business Process Analysis and Reengineering • Change Management 	Small
Dee Hansford Consulting	Sacramento, CA	Dee Hansford offers services based on years of consulting expertise incorporating the design and implementation of highly effective, award-winning recognition and communication strategies that yield measurable results.	<ul style="list-style-type: none"> • Consulting & Coaching • Facilitation • Speeches & Workshops 	Small
Epsilon Systems Solutions, Inc.	San Diego, CA	Epsilon Systems Solutions, Inc. provides innovative technical and operational solutions to government, commercial and non-profit businesses.	<ul style="list-style-type: none"> • Environmental Management Services • Fleet Engineering Services • Homeland Security Systems and Consulting Services • Hyperbaric System Design and Production • Marine Field Services • Nuclear Operations Program Assessment, Implementation and Training • Nuclear Safety Analysis and Documentation • Systems Engineering and Logistics • Systems, Technology and Program Management • Submarine and Surface Ship Warfare Systems 	Large

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BUSINESS CONSULTANTS - ORGANIZATIONAL ASSESSMENT				
FIRM	LOCATION	PROFILE	SERVICES OFFERED	BUSINESS TYPE
Etcetera Group, Inc.	Roseville, CA	The Etcetera Group, Inc. provides project management consulting services on projects with values ranging from \$10,000 to over \$460 million.	<ul style="list-style-type: none"> • Project Management Consultation • Project Management Training • Quality Management Consulting • Software Engineering • Goal Oriented Measurements 	Small
Facility Engineering Associates	Fairfax, VA	Facility Engineering Associates is a national engineering consulting firm delivering quality services ranging from facility condition assessments and environmental audits to facility asset management and restoration projects.	<ul style="list-style-type: none"> • Facility Management and Condition Assessment Services • Repair and Restoration • Instrumentation and Monitoring • Reserve Studies • Environmental • Education and Training 	Large
Gartner, Inc.	Sacramento, CA	Gartner, Inc. is a leading independent consultancy helping major enterprises strategize, execute, and manage their most mission-critical technology-based initiatives. By using Gartner methodologies and the full power of Gartner Research, clients learn to measure performance, optimize infrastructure, and create quantifiable business value.	<ul style="list-style-type: none"> • Benchmarking Solutions • Critical Program Management • Go-To-Market Strategies • Performance Optimization • Public Sector Solutions • Risk Management • Sourcing Execution & Management • Strategy and Architecture 	Large
GCAP Services, Inc.	Irvine, CA	GCAP Services, Inc. assists clients in dealing with dynamic business changes and technology innovation.	<ul style="list-style-type: none"> • Consulting Services • Program and Contract Management • Information Technology and System Integration • Disadvantaged Business Enterprise (DBE) Supportive Services 	Small
Heartstream Education	Seattle, WA	Heartstream Education provides efficient and powerful tools for planning the future, solving complex problems, reorganizing departments, streamlining programs, creating mission, vision, and value statements, and producing business plans.	<ul style="list-style-type: none"> • Strategic Planning & Implementation • Program Development • Curriculum Design • Organizational Systems Consulting • Positive Accountability Processes • Leadership Coaching • Team Capacity Building • Meeting Facilitation 	Large

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Innovative Emergency Management	Baton Rouge, LA	IEM has become one of the leading risk management companies in the US, providing services to private industry and government agencies including the Federal Emergency Management Agency (FEMA) and the US Department of Defense.	<ul style="list-style-type: none"> • Quantitative Emergency Management • Planning • Software Development • Other Services 	Large
Integrated Solutions For Business & Government, Inc.	Sacramento, CA	ISBG is an alliance of exceptional professionals devoted to unraveling the dilemmas confronting businesses and government agencies, and providing integrated solutions to both the private sector and the executive levels of government.	<ul style="list-style-type: none"> • Information Technology Solutions • Hardware and Software Solutions • Internet Solutions • Feasibility Study Solutions • Marketing Solutions • Network Solutions • Personnel Services and Augmentation Solutions 	Small
Integrative Project Solutions	El Dorado Hills, CA	The mission of IPS is to assist California public sector clients in achieving business objectives through delivery of customized business and technology solutions which maximize the value of client services, improve decision making, and result in project success.	<ul style="list-style-type: none"> • Project Consulting • Technology Implementation • Strategic Planning • Organizational Evaluation • Business Process Review • Feasibility Study Reports • Budget Assistance 	Small
JDM Associates	Annapolis, MD	JDM Associates is a service-disabled veteran owned company with extensive government, private industry, and association project management experience.	<ul style="list-style-type: none"> • Energy Management • Training and Education • Green Buildings • Strategic Planning and Policy Guidance • Energy Procurement • Utility Audit Services • Energy Rebates and Tax Incentives • Communications and Marketing • Renewable Energy 	Large

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Kimley-Horn & Associates, Inc.	Oakland, CA	Kimley-Horn is one of the nation's most comprehensive and best respected engineering and land planning firms, composed of civil, transportation, and systems engineers; urban and land planners; environmental specialists; landscape architects and urban designers; and computer/systems specialists. Kimley-Horn provides a wide range of consulting services to public and private clients for both the visible "built environment" and the less-visible elements related to these facilities	<ul style="list-style-type: none"> • Aviation • Environmental Services • Forensic Engineering • Intelligent Transportation Systems • Land Development • Transportation • Transit • Urban Planning/Landscape Architecture • Water Resources • Wireless Communications 	Large
KPMG	Sacramento, CA	KPMG is a global network of professional firms providing Audit, Tax and Advisory services.	<ul style="list-style-type: none"> • Audit • Tax • Advisory 	Large
Leading Resources, Inc.	Sacramento, CA	LRI is a consulting company dedicated to serving the leadership and strategy needs of organizations in the United States and around the world by offering consulting services, executive coaching, leadership tools, and executive seminars.	<ul style="list-style-type: none"> • Strategic Planning • Organizational Development • Change Management • Organizational Assessment • Business Process Improvement • Business Planning • Succession Planning • Executive Development • Team Development. • Governance Development 	Large
Lumetra	San Francisco, CA	Lumetra is a healthcare consulting organization dedicated to improving the quality, safety, and integrity of healthcare. An independent, nonprofit organization with more than two decades of experience, Lumetra offers a broad array of services to public and private organizations.	<ul style="list-style-type: none"> • Quality & Performance Improvement • Scientific Data Analysis & Reporting • Health Information Technology • Independent Medical Review • Healthcare Marketing & Communications 	Large

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Mercer Human Resource Consulting	Denver, CO	Mercer Human Resource Consulting is the global leader for trusted HR and related financial advice, products and services. The firm provides consulting advice to its clients regarding the financial and retirement security, health, productivity, and employment relationships of their global workforce.	<ul style="list-style-type: none"> • Communications • Health & Benefits • Human Capital • International Consulting • Investment Consulting • Mercer HR Services • Mergers & Acquisitions • Retirement Consulting 	Large
MTG Management Consultants, LLC	Seattle, WA	MTG Management Consultants, L.L.C. is a leading independent management consulting firm that focuses on the management and technology issues affecting the local, state, provincial, and federal government communities.	<ul style="list-style-type: none"> • Management & Business Process Redesign • Feasibility Analysis • Performance Audits & Assessments • Organization, Culture & Methodology Development • Project Management Approach, Office, & Training • Project Procurement, Management & Quality Assurance 	Large
R&G Associates, LLC	Folsom, CA	R & G and Associates, is an 8 year old Small Business consulting and training organization composed of professionals with extensive individual experience in federal, state and local government operations.	<ul style="list-style-type: none"> • Risk assessments and risk reduction strategy development • Short term planning for both agencies and program areas • Organization reviews to improve operations • Strategic Planning/Strategic Initiative Development • Evaluation of program realignment with a focus on lowering operational cost • Recommendations for state and local level regulations or policy changes • Information system planning - short or long term • Compliance reviews/management and program audit support • Independent bid/proposal evaluation • Contract dispute resolution and bid protest dispute support • Outsource activity support and plan evaluation 	Small

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School Innovations & Advocacy	Ranch Cordova, CA	For the last 10 years, School Innovations & Advocacy has been the leader in getting California schools reimbursed for mandated activities. School Innovations & Advocacy's scope of services continues to expand around our expertise in legislative matters, execution processes, and quality assurance procedures.	<ul style="list-style-type: none"> • Advocacy Services • Attention2Attendance, featuring eTruancy • Mandate Prep • SiteServ (SSP) • ePortfolio • Making the Grade (SARC) • Student HealthQuarters and IEP Manager • Attention2Attendance, featuring Notification to Teachers 	Large
System Metrics Group	San Francisco, CA	SMG is a transportation consulting firm founded by senior professionals with significant technology and management consulting experience to provide advice to public agencies.	<ul style="list-style-type: none"> • Strategic planning • Planning analysis • Planning tool development • Integration of performance measurement into decision making 	Small
TAO Emergency Management Consulting	Spring Branch, TX	TAO Emergency Management Consulting provides premiere emergency management services for all natural and man-made disasters, including terrorism.	<ul style="list-style-type: none"> • Natural and Human-based emergency plans (including terrorism) • Program Assessment and Auditing • Course of Action for Improving Operations • Work Plans and Scheduling • Operational Plans and Procedure Development, Including COG, COOP, and CIP • Training, Drills, and Exercise Support • Maintenance Program Design • Quality Assurance and Quality Control Design • Team Building Support • Technology Integration into Emergency Management • Natural Disaster Mitigation Planning and Development • Counter-Terrorism Mitigation Studies and Planning • Facility and Equipment Preparation and Design • Security and Workplace Violence Planning • Workplace Safety Planning 	Small

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The Environmental Company, Inc.	Charlottesville, VA	TEC Inc. offers a complete network of planning, environmental, and engineering consulting services to public- and private-sector clients.	<ul style="list-style-type: none"> • TEC ACRE • TEC Infrastructure Consultants (ICON) • TEC Engineering • TEC Infodex • TEC ENVIRONMENTAL MANAGEMENT • TEC PLANNING: • TEC GmbH 	Large
The Highlands Consulting Group	Sacramento, CA	The Highlands Consulting Group is a team of management consultants, each with over 8 years of experience, qualified to provide services under the Information Technology CMAS and the Business Consulting Services California Multiple Award Schedule (CMAS).	<ul style="list-style-type: none"> • Project Management • Strategic Planning • BPR & BPI • FSRs/Cost Benefit Analysis • Homeland Security/Emergency Management • Training 	Small
The Marlin Alliance, Inc.	Carlsbad, CA	The Martin Alliance, Inc. is a Business Transformation Consulting practice.	<ul style="list-style-type: none"> • Business Process Re-engineering/Process Optimization • Change Management/Change Facilitation • Performance Enhancement • Industry Standards and Regulatory Compliance • Training/Executive Coaching • Strategy/Planning 	Large
The Medstat Group, Inc.	Sacramento, CA	Thomson Medstat is an \$8-billion provider of integrated information-based solutions helping business and professional customers in healthcare, higher education, financial services, and law make better decisions faster.	<ul style="list-style-type: none"> • Account Group Reporting • Benefit Modeling • Claims Auditing • Clinical Quality • Data Analysis & Benchmarking • Decision Support Systems • Disease Management Analytics • Financial Management • Marketing and Planning • Pharmaceutical Products • Research & Consulting Services 	Large

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The Rand Corporation	Santa Monica, CA	The Rand Corp. conducts research & analysis which is carried out on behalf of public and private sponsors and clients. Consulting Services may include providing expert advice, assistance, guidance or counseling in support of agencies' mission oriented business functions. Examples of such services may include studies, analyses and reports documenting any proposed developmental, consultative or implementation efforts.	<ul style="list-style-type: none"> • Strategic, business and action planning • High performance work • Process and productivity improvement • Systems alignment • Leadership systems • Organizational assessments • Cycle time • Performance measures and indicators • Program audits, evaluations, and customized training 	Large
USC Consulting Group, LLC	Tampa, FL	USCCG is an independent management consulting firm with nearly 40 years' experience in the area of operational effectiveness.	<ul style="list-style-type: none"> • Six Sigma • Lean transformation • Supply chain optimization • Process optimization • Logistics • Training and modeling 	Large
Visionary Integration Professionals	Folsom, CA	VIP is a national management consulting, technology services, and outsourcing company.	<ul style="list-style-type: none"> • Technology Integration and Operations • Quality Management • Management Consulting • Converged Networks and Telecommunications 	Large
Warren McVeigh & Griffin, Inc.	Newport Beach, CA	Warren, McVeigh & Griffin, Inc. is one of the oldest and best-known independent risk management consulting firms in the United States. Warren, McVeigh & Griffin, Inc's consultants come from industry and government risk management backgrounds, having held senior risk management positions in their respective sectors.	<ul style="list-style-type: none"> • Risk finance • Property and casualty insurance • Loss control • Risk management administration • Self-insurance • Claims management • Safety • Management information systems • Risk analysis 	Small

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Wested	San Francisco, CA	WestEd is a nonprofit research, development, and service agency whose services provide learning opportunities, consulting, and technical assistance to clients in education and human development.	<ul style="list-style-type: none"> • Assessment, Standards, & Accountability • Early Childhood/Early Intervention & Prevention • Evaluation • Healthy Kids, Families, & Communities • Language, Culture, & Equity • Leadership & Professional Development • Literacy • Mathematics & Science • School & District Improvement • Special Education & Disabilities • Technology 	Large