



### Deborah Joffe

Associate Manager  
Public Consulting Group,  
Inc.

Tenure: Since 2006

#### TANF Expertise

Worked with TANF agencies in 20+ states to design effective programs and maximize funding for TANF programs

Presented at national TANF conferences and a member of APHSA's Center for Employment & Economic Well-Being workgroup

Worked closely with HPOG program in San Diego County

## RELEVANT PROJECT EXPERIENCE

### Indiana Department of Child Services

#### TANF Assessment

As part of a larger revenue management project, managed a project to leverage federal TANF funding to cover the cost of certain TANF-eligible child welfare services. Worked with state to update provider contracts and to develop a quality assurance protocol for site reviews and desk audits. Work enabled DCS to claim more than \$200M in TANF funded child welfare services. Oversee calculation of quarterly claims of TANF-funded services.

### State of Maine – Department of Health and Human Services

#### Federal Block Grant Review

Project Manager for engagement in which PCG performed an in-depth review of the Child Care Development Fund block grant (CCDF), Temporary Assistance for Needy Families (TANF), and the Social Services Block Grant. Review focused on opportunities for maximizing revenue and improving outcomes. Project also included reviewing the child care eligibility determination process for TANF and CCDF funded child care programs. PCG reviewed business processes and make recommendations for improvements to help streamline the eligibility process and improve the experience and outcomes for child care providers and parents.

### Commonwealth of Massachusetts – Executive Office of Health and Human Services

#### TANF Contingency Fund Project

Project Manager on effort to help Massachusetts draw in and retain \$91M a year of new federal revenue through the TANF Contingency Fund. Project included identifying state spending that is eligible to be used as Maintenance of Effort (MOE) under TANF. Led project team through weekly meetings and provided fiscal management consulting services for client. Provide regulatory review of TANF rules and assess risks involved in new TANF MOE claims. In FFY 2008 and FFY 2009, Massachusetts met and exceeded spending requirements to retain full TANF Contingency Fund. In FFY 2009, project expanded to include identification of spending that helped Massachusetts access the TANF Emergency Contingency Fund (ECF) established through the American Recovery and Reinvestment Act (ARRA). Project included analysis of ECF-eligible spending and participation in discussions with the federal Administration for Children and Families (ACF).

### State of Michigan – Department of Human Services

#### TANF Contingency Fund Project

Assisted Michigan in accessing new federal revenue through the TANF Contingency Fund by identifying state spending that is eligible to be used as MOE under TANF. Provided regulatory review of TANF rules and assessed risks involved in new TANF MOE claims. Project involved work with community organizations to identify third-party expenditures that qualify as TANF MOE. Since FFY 2008, Michigan met and exceeded spending requirements to retain full TANF Contingency Fund. In FFY 2009 and FFY 2010, the project also included consultation regarding the TANF Emergency Contingency Fund. Served as project manager in FFY 2012.

**State of Rhode Island – Department of Human Services**  
**TANF Consulting Services**

The Rhode Island Department of Human Services (DHS) contracted with Public Consulting Group (PCG) to review several Temporary Assistance for Needy Families (TANF) Maintenance of Effort (MOE) claims that were the subject of single state audit findings. All of the programs included in the review are for programs operated by the Department of Children, Youth and Families' (DCYF).

**State of Missouri – Department of Social Services**  
**TANF MOE Identification and Contingency Fund Project and Procedures Development**

Served as project manager to assist the state access new revenue through the ARRA TANF Emergency Fund. Coordinate effort to meet with state agencies and community partners to identify potential MOE sources. Participated in strategy calls with the governor's office to facilitate maximization of the ARRA opportunity. In FFY 2012, served as project manager to help Missouri draw down and retain \$19 million in TANF Contingency Funds, through the identification of third party MOE. Previously, served as project manager in an effort to identify \$6.9M of TANF MOE eligible expenditures. Projects included a review of various state departments' budgets and programs ranging from after school activities for at-risk youth to public housing subsidies to identify existing expenditures that qualify as TANF MOE.

**Additional TANF MOE Consulting Services provided to Alaska, Georgia, Utah, Maine, and North Carolina.****County of San Diego – Health and Human Services Agency**  
**CalWORKs Welfare-to-Work/ Refugee Employment and Child Care Payment Services**

Led contract transition efforts as the Project Manager for program providing CalWORKs welfare-to-work (WTW) employment services to nearly 5,000 clients, including 1,100 refugee clients, in the east and south regions of the County. Manage two regional offices, a budget of \$10 million, and a staff of 130, including 35 subcontracted case managers. Program includes providing employment case management services, job skills training, and supportive services to enable uninterrupted participation in the program. Program includes child care case management, provider management and child care payment services. Uses data-driven analysis to improve program efficiencies and promote better client outcomes. Works with county to ensure alignment with county's Work First goals.

**U.S. Department of Health and Human Services,**  
**Administration for Children and Families, Office of Family Assistance**  
**Online Coaching Training Curriculum Development**  
Project Manager overseeing work to develop online coaching training for TANF case managers. Collaborated with OFA to develop on-line interactive training components and a series of 30-60-minute training modules, that include quizzes, activities, and assessments to ensure basic retention, application and mastery of content. Ensure training met adult learning styles.

**State of Minnesota, Ramsey County Workforce Services**  
**MFIP/DWP Career Coaching Staff Development and Training**

Managed a project to develop a series of Introductory and Intermediate Coaching trainings and support materials specifically designed for the Ramsey County Workforce Solutions service delivery system. Project delivered 63 hours of training to more than 200 managers, supervisors, and case managers from the County's Temporary Assistance for Needy Families (TANF) program. Created customized learning aids to reinforce coaching concepts post-training. Learning support materials include "Coaching Circle Lessons" used by MFIP/DWP in-house coaches; and two sets of monthly coaching tips, one for use by case managers when working with clients and the other for Supervisors" to strengthen their coaching skills when working with direct reports.

**State of California - County of San Mateo, California - Human Services Agency (HSA)****Staff Development Curriculum Design and Training**

Managed a project to develop new worker training for HSA's eligibility staff and TANF case management. Project include more than 16 weeks of training materials and a plan to increase support for staff development. Project also included development and delivery of a "Train-the-Trainer" curriculum delivered to existing training staff on the areas of curriculum development, adult learning theory, learning objectives, transference of learning and measurement of trainee performance. Provided subject matter expertise in reviewing of curriculum for New Worker Induction training to ensure curriculum development followed principles of adult learning.

**State of Maine – Department of Health and Human Services****Child Care Redesign**

Project managed an effort to advise the State of Maine on a transformational redesign of the Temporary Assistance for Needy Families (TANF) and Child Care Development Block Grant (CCDF) federally supported child care programs administered by the Department of Health and Human Services (DHHS) towards one unified child care system that is easy and efficient for families, providers, and DHHS staff. PCG prepared a recommended work plan and is contracted to assist in full implementation of the new unified child care system. Implementation will include analysis and recommended changes regarding the impact of system changes to child care licensing policies and practices.

**State of Ohio – Department of Job and Family Services****Ohio Works First Work Participation Improvement Project**

Project Manager for engagement in which PCG performed an in-depth analysis of Ohio's administration of the Temporary Assistance for Needy Families (TANF) Ohio Works First (OWF) Work Activity Program for the Ohio Department of Job and Family Services (ODJFS). PCG assisted the state of Ohio in meeting its federal WPR requirements. PCG also identified additional Maintenance of Effort and other funding strategies, such as the use of Solely State Funding, to minimize Ohio's Target WPR and otherwise enhance countable participation.

**County of San Diego – Health and Human Services Agency**  
**TANF Diversion Program and WPR Technical Consultation Services**

Assisted the County in developing a new TANF diversion program and other policy changes to increase the County's Work Participation Rate and/or reduce its caseload. Project culminated in a 6-month pilot of a new Diversion program. Worked with San Diego County to negotiate a state waiver with California Department of Social Services and assisted in conversations with ACF to gain approval for program design. Project team developed performance tracking tool to evaluate pilot program.

**State of Tennessee– Department of Human Services, Family Assistance Division****TANF Waiver Project**

Assisted the state as it transitioned from a program operated under an AFDC waiver to one that is compliant with new federal law under the Deficit Reduction Act. Provided TANF policy and business process consulting, including best practices for WPR enhancement. Researched Tennessee's welfare system and made recommendations to assist the state in complying with federal standards. Conducted data analysis on the state's welfare population and fiscal analysis on the impact of proposed policy changes.

**State of Maine – Department of Health and Human Services****Analysis of Sexual Assault and Domestic Violence Services**

Engagement manager on current effort to conduct an analysis of domestic violence and sexual assault services, including the domestic violence shelter system. Conducting a peer state analysis to identify best practices that could improve service delivery in Maine. Visiting service providers to identify services being provided, review policies and procedures, and identify areas for improvement.

**SEED Foundation – Washington, D.C.****Analysis of TANF and Title IV-E Claimability**

Co-authored primer on TANF and IV-E claiming guidelines tailored to the Foundation's needs. Analyzed program expenditures and made recommendations about line-item claimability. Highlighted reporting requirements associated with assistance and non-assistance claims.

**U.S. Department of Health and Human Services - Administration for Children and Families****Faculty Member, California Counties Technical Assistance Academy**

Served as faculty members for a Technical Assistance Academy sponsored by ACF. ACF sponsored this Technical Assistance Academy in collaboration with the California Department of Social Services (CDSS) to help counties improve their Work Participation Rate (WPR). Presented on a variety of strategies used by states to improve their WPR and facilitated several small groups with the counties.

## **OTHER PROFESSIONAL EXPERIENCE**

### **Editor, Cambridge Chronicle**

Managed the day-to-day operations of a weekly newspaper covering the city of Cambridge, MA. Oversaw full-time staff, plus freelance writers and cartoonists. Researched and wrote editorials about issues relevant to local community.

### **Reporter, Cambridge Chronicle and West Roxbury Transcript**

Reporter for two weekly newspapers. Covered politics, schools, government, police and feature beats.

## **EDUCATION**

### **University of Massachusetts, Boston**

John W. McCormack Graduate School Of Policy Studies  
*Master of Science, Public Affairs*  
2006

### **Brandeis University**

*Bachelor of Arts*  
2001

## **MEMBERSHIPS AND CERTIFICATIONS**

### **Project Management Institute**

Project Management Professional (PMP)

## **PUBLICATIONS**

Unpublished master's thesis: *Out of Reach: Middle-income Housing in Cambridge and Brookline, 2006.*



**Meredith Crouse**  
Senior Consultant

## RELEVANT PROJECT EXPERIENCE

### **Workforce Solutions Capital Area – Austin, Texas**

#### Program Monitoring (2018 – Present): Project and Contract Manager

Serve as Project and Contract Manager to provide program monitoring services and review of contractors. Programs monitored include TAA, NCP, SNAP, TANF/Choices, WIOA (Adult, Dislocated Worker, and Youth), and Child Care.

### **Massachusetts Executive Office of Labor and Workforce Development – Boston, Massachusetts**

#### Apprenticeship Expansion (2020 – Present): Project Manager

Develop frameworks for Industry-Recognized Apprenticeship Programs (IRAP) and Apprenticeship Pathways for Youth within traditional and expansion apprenticeship industries (i.e. construction, manufacturing, technology, healthcare, and energy). Provide inventory of online apprenticeship resources and recommendations for online apprenticeship tool suited for statewide audiences.

### **Massachusetts Commission for the Blind – Boston, Massachusetts**

#### Vocational Rehabilitation Research Initiatives (2020 – Present): Apprenticeship and Workforce Development Lead

Conduct a comprehensive statewide needs assessment, including a focus on vocational rehabilitation and Pre-ETS services. Producing feasibility studies on apprenticeships in emerging industries and blind business enterprises for blind and visually impaired vocational rehabilitation consumers.

### **Clark University – Worcester, Massachusetts**

#### U.S. Department of Labor H1-B Grant: Scaling Apprenticeships in Information Technology, “Tech Quest Apprenticeship Expansion”

#### (2019 – Present): Strategy & Partner Relationship Support

Provide strategy, support, and administrative services on behalf of Clark University for \$12M apprenticeship grant from USDOL. Major goals of the grant are to enroll 4,000 pre-apprentices and 1,000 apprentices in IT-related occupations. Ms. Crouse supports project strategy and partner relationship support among Workforce Development Boards, Institutes of Higher Education, and training organizations.

### **San Diego Workforce Partnership – San Diego, California**

#### CalFresh (SNAP) E&T (2019 – Present): Program Scaling Support

Provide CalFresh E&T administrative services on behalf of San Diego Workforce Partnership, including claiming 50/50 reimbursement funds and scaling the program in San Diego County.

#### Internship Program Design & Strategy (2019 – 2020):

#### Project Manager

Conducted a business process review of an internship program for a large school district in San Diego County. Provided recommendations to develop and scale a more robust program that would allow a greater number of students to access work-based learning experiences and connect to college and career. Collaborated with the District Superintendent and CTE and Pathways Director, as well as the Workforce Development Board business services and program staff. Ms. Crouse led

the project, including the stakeholder engagement, partner coordination strategy, and program design.

**Los Patojos – Jocotenango, Guatemala**

School Design and Strategic Planning (2019 – Present):

***Career Pathways Lead & Project Management***

Support an emerging, independent school in central Guatemala with the development of employment and continuing education pathways for students. Provide training and technical assistance for school leaders and faculty on employer engagement, career exploration and work-based learning, community asset mapping, and connecting opportunity youth. Help advise on school budget, strategic planning, curriculum development, data and benchmarking, and leadership development activities.

**CareerSource North Central Florida – Gainesville, Florida**

Eligible Training Provider List (ETPL) Assessment (2018-19): ***Project Manager***

Led a project to update and identify training gaps in the existing ETPL to ensure training opportunities align with the Workforce Services Plan, Board's annual priorities, and service provider feedback.

Policy Audit (2018-19): ***Project Manager***

Project managed and worked with the CareerSource staff to update policy and procedures to ensure compliance with federal WIOA legislation and alignment with regional priorities.

**Houston-Galveston Area Council – Houston, Texas**

Financial Aid Support Center Business Process Redesign (2017 – 2019): ***Project Manager***

Conducted a business process review for the Houston-Galveston Area Council Workforce Development Board and the region's Financial Aid Support Center, which serves individuals applying for childcare and training funds. Worked with staff to develop the Support Center's ability to identify and implement capacity building ideas for the system, including improving efficiencies in customer service and work processes. Provided recommendations and technical assistance for implementation.

**Massachusetts Executive Office of Education, Department of Elementary and Secondary Education, and Department of Higher Education – Boston, Massachusetts**

New Skills for Youth – High Quality College and Career Pathways (2017-2019): ***Communications Strategy Lead & Project Management Support***

Provided project management, communications strategy, and professional development curriculum and delivery for a three-year joint initiative with the Executive Office of Education, Department of Elementary and Secondary Education, and Department of Higher Education to help roll out a new pathways initiative statewide. Ms. Crouse led the cross-agency communications work group and provided project management support to the interagency steering committee. She collaborated with project team on the creation of professional development content and delivery plan for school districts across the Commonwealth.

**Cristo Rey School Boston – Boston, Massachusetts**Strategic Planning (2018): Project Manager

Served as Project Manager for a high school strategic planning effort. Facilitated a steering committee of school leaders and board members. Assisted in the development of short- and long-term goals and vision. Conducted data analysis, as well as focus groups with students and faculty. Contributed to the development of multi-year action plan to carry out goals from the strategic plan.

**Sacred Heart School – Lynn, Massachusetts**School Redesign (2018): Project Management & Communications Support

Provided project management and communications support to K-8 school leaders, school board, and advisory committee in an effort to adopt new programming to strengthen the school's sustainability. Led the development of communication tools to be used for internal and external stakeholders. Collaborated with project team on the creation of action plans for the school to use in the implementation of a dual-language program, STREAM framework, and grade reconfiguration.

**County of Santa Cruz Workforce Development Board – Santa Cruz, California**Policy Audit (2017-2018): Project Manager

Served as project manager and provided research support for a policy audit for the Santa Cruz County Workforce Development Board. Assisted in drafting of policy and procedures language that is compliant with federal WIOA legislation and aligns with regional priorities.

Board Development (2017-2018): Project Manager

Provided project management and research support to a Workforce Development Board in their efforts to offer professional development for Board members. Assisted in the development of Board member orientation materials and provides recommendations to Board leadership around opportunities for strong and sustainable Board membership, activities, and continued learning.

**RELEVANT PROFESSIONAL EXPERIENCE****Boston Private Industry Council (PIC) – (MassHire Boston) Workforce Development Board – Boston, Massachusetts**Project Management, Industry Collaboration, College and Career Pathways

Served as Employer Engagement Manager, supporting initiatives for Boston's Workforce Development Board related to industry and education collaboration, as well as college and career pathways for youth and adults. Directed the Boston Healthcare Careers Consortium, a sector convening of over 50 business, education, and workforce system partners that has been recognized by the U.S. Department of Labor as a national model for leadership in industry collaboration. Managed *From Classroom to Employment Project*, a two-year collaboration between select community college training programs and employers to provide job-readiness wrap-around services to students, assist graduates in job placement, and advise colleges on curriculum and industry trends. Liaised between employers, education, and the workforce system to help facilitate new partnerships



and programs for early-career pipeline development and incumbent worker upskilling initiatives. Managed Boston Public School (BPS) youth employment programs with employers as part of the Mayor's Summer Jobs Program and the Massachusetts Connecting Activities work-based learning initiative. Coordinated the Business Services Committee of Boston's Workforce Development Board and American Job Centers. Led employment outcomes data collection and reporting, event management and logistics, grant management, workshop development and facilitation, and trainee outreach.

### **Claremont McKenna College – Claremont, California**

#### Institutional Research, Data Analysis, Federal Reporting and Compliance, Strategic Planning

Led the development, production, and improvement of internal and external annual reports for strategic planning and institutional reaccreditation activities; improvements led to overhaul of college-wide data reporting methods and policies. Executed data reporting and maintained compliance for U.S. Department of Education Integrated Postsecondary Education Data System (IPEDS) and Higher Education Opportunity Act (HEOA). Managed College reporting and proofing of institutional data and statistics to various national publications (US News & World Report, etc.) Managed Institutional Review Board (IRB) activities for the college, including overhauling policies to maintain compliance with federal human protections regulations, review of all research protocols, and coordination with the grants office.

## **EDUCATION**

### **Cal Poly Pomona**

*Master of Public Administration*

### **Virginia Tech**

*Bachelor of Science, Business*

## **PROFESSIONAL ASSOCIATIONS, PRESENTATIONS, & FACILITATIONS**

Scenario Advisory Committee Member, MetroCommon 2050 Regional Plan, Metropolitan Area Planning Council, Massachusetts, 2019

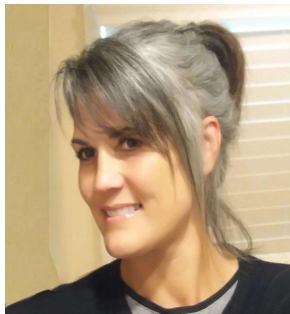
Fellow, Education Policy Fellowship Program, Institute for Educational Leadership, 2018-19.

*Future of Work Convening: Las Vegas*, Southern Nevada Workforce Connections, Bertlesmann Foundation and National Association of Workforce Boards, July 2018.

*Establishing a Shared Sector Partnership Work Plan*, National Webinar, U.S. Department of Labor, Employment and Training Administration, March 2016.

*Industry Engagement: Convening Multiple Employers - Moving Beyond the Hub and Spoke Model*, National Webinar, U.S. Department of Labor, Employment and Training Administration, Nov 2015.

*Bringing Business, Education, and the Workforce System to the Table*, Commonwealth Workforce Coalition, Massachusetts State Conference, May 2015.



**Jennifer Starr**  
*Business Development  
Associate*

## RELEVANT PROJECT EXPERIENCE

### **Clark University – Worcester, Massachusetts**

#### Analyst

U.S. Department of Labor H1-B Grant: Scaling Apprenticeships in Information Technology, "Tech Quest Apprenticeship Expansion". Support team in providing administrative entity services on behalf of Clark University apprenticeship grant. Assist in the development of monitoring standards as well as the registration process.

### **Workforce Solutions Capital Area – Austin, Texas**

#### Lead Quality Assurance Analyst

Act as subject matter expert providing monitoring services for WIOA (Adult, Dislocated Worker, and Youth), SNAP, TANF, TAA, Child Care and Non-Custodial Parents (NCP). Lead risk assessment, updates to monitoring tools, development of monitoring reports and corrective action plans. Participate in entrance and exit conferences with providers. Lead follow-up reviews.

### **CareerSource North Central Florida – Gainesville, Florida**

#### Quality Assurance Analyst

Acted as an expert consultant for one-stop managers, and assisted in the development of policies, procedures and best practices for one-stop operations. Reviewed contract compliance in order to monitor and maintain status, assist with the development of monitoring tools, and designed research projects and studies concerned with the improvement of organizational procedures. Made recommendations regarding the solution of organizational problems via reports and special studies and made recommendations regarding areas of management where additional evaluation was needed. Reviewed proposed changes in laws and legislation to determine their impact upon organizational policy. Involved with quality assurance program planning on a regional and statewide level and monitored contract requirements and impose corrective actions as needed.

## RELEVANT PROFESSIONAL EXPERIENCE

### **Area Agency on Aging – Palm Beach Gardens, Florida**

#### Program/Contract Manager/Quality Assurance Analyst

Monitored and evaluated service provider contracts in accordance with applicable state and federal regulations and policies, to determine adherence to policy and program effectiveness. Imposed and followed-up with corrective actions. Designed, developed, and implement program initiatives. Analyzed reports regarding service allocation, service timelines, and adherence to budget. Acted as liaison between the Area Agency on Aging and local organizations. Provided technical assistance as needed. Reviewed contract proposals with the management team in order to

assess the impact of services, clients, and costs of grant revisions proposed by service providers during the contract period.

**VOCA of Florida (ResCare) – Delray Beach, Florida**

Program Director – Residential Services

Provided management and oversight of Residential and Adult Day Training programs. Established policies, procedures and best practices. Delivered training to program and management staff. Conducted internal quality assurance monitoring of all programs to ensure contract compliance.

**Motivational Services, Inc. – August, Maine**

Program Manager – Employment Services

Monitored the program for State and Federal regulations. Managed workloads, hired, trained and provided administrative supervision to staff. Provided training in vocational skills, as well as, job developing, job coaching and counseling on and off the job site. Assisted with employer/co-worker consultation and conflict management. Additional responsibilities included creating/maintaining clinical records, developing care plans, planning and facilitating quarterly reviews and rehabilitation team meetings.

**EDUCATION**

**University of Maine**

*Bachelor of Arts in Sociology*

*Certificate in Paralegal Studies*

*Psychosocial Rehabilitation Certification*

*Employment Specialist Certification*



**Kate Smith**  
*Consultant*

## RELEVANT PROJECT EXPERIENCE

### **Missouri – Department of Social Services**

#### VOCA Unit Compliance Analysis

Project Manager. Analyzing the Missouri Department of Social Services' VOCA Unit's program management and compliance efforts to ensure alignment with federal VOCA regulations and guidelines.

### **South Dakota – Department of Public Safety**

#### Victims' Services Program Monitoring

Project Manager. Assisted the South Dakota Department of Public Safety with the fiscal monitoring of victim service providers receiving federal grant funds, including VOCA, STOP, and FVSPA. This includes ensuring reviews are completed within the required timeline, performing desk reviews and creating provider reports. Assisted in creating fiscal and programmatic monitoring review tools.

### **Indiana – Department of Child Services**

#### Federal Revenue Maximization

Project Team. Assisted in drafting a Standard Operation Procedures Manual for TANF audits. Assisting in performing a gap and root cause analysis to determine the Indiana Department of Child Services' readiness to comply with the Family First Prevention Services Act.

### **Maine – Department of Health and Human Services**

#### Domestic Violence and Sexual Assault Needs Assessment

Project Team. Assisted the Maine Department of Health and Human Services update the Rider section of their contracts with the Maine Coalition to End Domestic Violence and Maine Coalition Against Sexual Assault to include applicable requirements for those agencies receiving state and Federal funding, such as Victim of Crime Act (VOCA) and STOP formula grants. Assisted in creating performance measures for each of the coalitions to be included in their contract with the State.

#### OCFS Program Monitoring

Project Team. Assisted the Maine Office of Child and Family Services with creating victim services subrecipient programmatic and fiscal monitoring tools.

### **Arizona – Department of Child Safety**

#### Title IV-E Training Claiming and Revenue Assessment

Project Manager. Oversaw the completion of three Federal revenue maximization tasks, including Title IV-E Training Claiming, Title IV-E Reimbursement for Children who are foster care candidates, and Supplemental Security Income and Retirement Survivors' Disability Insurance. Assisted with the completing the Title IV-E Training Claiming portion of the project by reviewing DCS and university budget and expense reporting systems, reviewing DCS's current methodology for claiming certified public expenditures, and reviewing university course training methodology.

**Georgia – Georgia State University**Title IV-E Stipend Consulting Services

Project Manager. Assisted Georgia State University with enhancing their Title IV-E Stipend Program. This includes reviewing cost reporting, budgets and curricula to ensure universities are maximizing their training and administrative Title IV-E reimbursability.

**Pennsylvania – Department of Human Services**Title IV-E Compliance Quality Assurance

Project Team. Responsibilities include providing quality assurance and technical assistance to counties regarding Title IV-E maintenance and administrative claiming. The random moment time study project involves the analysis of case workers case file documentation to assist in Title IV-E administrative claiming. In addition, consultation is provided on a wide range of issues including Juvenile Justice, adoption assistance, the implementation of a guardianship assistance program, and other fiscal/program activities. PCG recently assisted Pennsylvania in passing their federal IV-E audit.

**Missouri – Department of Social Services**Title IV-E Case File Eligibility Review

Project Team. Reviewed Title IV-E eligibility case files on-site in St. Louis, to assist the Department in determining and confirming the accuracy of Title IV-E determinations made with state and federal policies and in implementing strategies to maximize the number of Title IV-E eligible determinations. Provided DSS with a report to outline trends in errors and corresponding policy citations.

**RELEVANT EXPERIENCE****FORCE COMMUNICATIONS LLC**Customer Solutions Manager / Commercialization Sr. Associate

Managed the execution of live and virtual pharmaceutical thought leader engagement advising activities. Provided clients with strategic direction to optimize thought leader engagements. Managed the completion of core claim and core value message documents. Obtained proper medical, legal and regulatory reviews and approval for program speakers and documents. Served as point person in day-to-day activities such as client and internal communications, program schedule development, and budget reviews. Assigned and monitored cross-functional team members' tasks. Led cross-functional team through project execution and completion. Maintained vendor relationships. Facilitated company business review meetings. Drafted proposals in response to pharmaceutical companies' Requests for Proposals.

**AIT LABORATORIES**Business Development Manager

Maintained relationships with over 200 active clients. Communicated daily with clients to address their customer service needs. Conducted company capabilities, needs assessment and market research meetings with prospective and active clients. Led cross-functional team in new product launch by maintaining project timelines and creating client

communications. Developed and implemented a strategic business plan to optimize growth within assigned area. Drafted proposals in response to government Requests for Proposals.

### **INDIANA CRIMINAL JUSTICE INSTITUTE**

#### Research Associate

Coauthored ICJI funding stream best practice briefs for the Sexual Assault Services Program (SASP) and Sexual Offense Services (SOS) programs. Evaluated Indiana Fatal Alcohol Crash Team programs. Coauthored the Indiana Crime Victimization Survey, results and analysis. Assisted in writing FY 2011 and FY 2012 Traffic Safety Division Annual Report. Assisted in writing FY 2013 Traffic Safety Division Highway Safety Plan. Assisted in writing a response to a legislative directive. Wrote program manager policy and procedure manuals for the Drug and Crime and Traffic Safety divisions. Provided statistical data to governmental officials and the public in response to crime and traffic safety inquiries. Reviewed subgrantee performance measures for the Drug and Crime and Traffic Safety divisions.

### **INDIANA CRIMINAL JUSTICE INSTITUTE**

#### Claims Analyst

Assessed victim of violent crime applications to provide financial assistance to victims and medical providers. Conducted investigations through communicating with medical providers, law enforcement officials, and victim advocates.

### **EDUCATION**

#### **Indiana University-Purdue University Indianapolis**

Master of Public Affairs

#### **Indiana University**

Bachelor of Science Public Affairs

## Amanda Lopez, Transform Consulting Group

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a.lopez@transformconsultinggroup.com

### Summary

Amanda Lopez is President at Transform Consulting Group—a woman-owned, strategic, and data-driven consulting firm focused on serving nonprofits, education, government, & communities. She provides the strategic direction for the company and leadership on client projects.

### Consulting Services/Experiences

#### Board Governance

- Provided in-depth Board Governance capacity building, including training; development of tools, policies, and procedures; strategic recruitment of new Board members; and ongoing support.
- Consulted with both charter schools' and nonprofit organizations' Boards of Directors.

#### Fund Development

- Written concise, clear, and persuasive grant proposals to leverage funding opportunities at the federal, state, and local levels.
- Created fund development plans for organizations to increase and diversify revenue.
- Provided numerous trainings to organizations on fundraising and grant writing.

#### Program Development and Management

- Developed new programs and written curriculum for literacy and college/career readiness.
- Developed and implemented state-funded programs.
- Managed state advisory committees: Governor-appointed Indiana Early Learning Advisory Committee (ELAC) and Healthy Families Indiana Think Tank.
- Managed new start-up programs and projects for clients.
- Managed grant review, selection, and procurement processes for various funders.

#### Program Assessment and Evaluation

- Worked with organizations to evaluate their program through the development of evaluation plans and continuous quality improvement process to accelerate impact.
- Written summary program assessment and evaluation reports and presentations.
- Provided trainings to organizations on evaluation, continuous quality improvement, and impact for their staff.

#### Strategic Planning

- Facilitated the strategic planning process for nonprofit organizations' and community coalitions' annual and multi-year strategic plans.
- Completed comprehensive needs assessments and environmental scans to support the development of strategic plans.
- Composed user-friendly strategic plans for clients.



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Offices in Indiana and Michigan  
www.transformconsultinggroup.com



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## Employers

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### **Transform Consulting Group, President**

October 2008 - Present                      Indiana

### **Association of Community Human Service Agencies, Policy Director**

October 2006 - October 2008              Los Angeles, CA

### **U.S. Department of Health and Human Services, Program Analyst and Acting Branch Chief, *Positions with: Office of the Secretary, Budget Office; Office of Head Start; Children's Bureau***

May 2004 - October 2006                  Washington, DC

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## Education

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### **University of Michigan, May 2004**

Master of Social Work, Concentration: Social Policies & Program Evaluation

### **Purdue University, May 2001**

Bachelor of Arts in Law and Society, *Honors*

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## Awards

First recipient of the **Purdue University Emerging Voice Alumni Award** for outstanding young professionals under 40 years old in 2007



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[www.transformconsultinggroup.com](http://www.transformconsultinggroup.com)

## Margaret Smith, Transform Consulting Group

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m.smith@transformconsultinggroup.com

### Summary

Margaret Smith is a Project Consultant at Transform Consulting Group—a woman-owned, strategic, and data-driven consulting firm focused on serving nonprofits, education, government, & communities.

### Consulting Services/Experiences

#### Evaluation

- Worked with organizations to evaluate their program through the development and implementation of evaluation plans.
- Facilitated focus groups and thematically analyzed qualitative data.
- Act as a local evaluator for 21<sup>st</sup> Century Community Learning Centers (CCLC); create and implement data management plan, conduct site observations, collect and analyze data.
- Written summary program assessment evaluation reports and presentations.
- Used data and evaluation results to inform programmatic recommendations and decisions.

#### Fundraising Strategies

- Researched funders and grant opportunities for a variety of youth-serving programs and nonprofit organizations.
- Wrote letters of intent and full grant applications on behalf of several nonprofit organizations.
- Worked with a youth-serving organization to develop a grant management tracking process to monitor the status of grant prospects and submissions.

#### Program Development

- Developed curriculum materials for a college preparation and leadership program.
- Developed program procedures, documents and curriculum for child sexual abuse prevention programming.

#### Project Management

- Provide project management support for: Governor-appointed Indiana's Early Learning Advisory Committee (ELAC) and Healthy Families Indiana Think Tank.
- Provide administrative support to committees and workgroups by scheduling and facilitating meetings.
- Create project documents including meeting agendas and summaries, logic models, and Gantt project management charts.



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Offices in Indiana and Michigan  
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## Employers

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**Transform Consulting Group**, Project Consultant  
April 2018-Present

**Indiana University School of Dentistry**, Masters Level Practicum  
August 2017-May 2018

**Chaucie's Place**, Prevention and Education Specialist  
August 2017-April 2018

**Project Home Indy**, Intern/Resident Advisor  
January 2017-August 2017

**Cummins Behavioral Health Services Inc.**, Life Skills Specialist  
January 2015-May 2017

**YMCA of Greater Indianapolis**, Counselor/Assistant Site Director/Site Director  
May 2012-December 2014

## Education

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**Indiana University**, May 2018  
Master of Social Work, Concentration: Community & Organizational Leadership

**Marian University**, December 2014  
Bachelor of Arts in Psychology, *Cum Laude*



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## Melissa Wall, Transform Consulting Group

144 S. Wabash St., Wabash, IN, 46992 | (317) 324-4070 ext. 12 |  
m.wall@transformconsultinggroup.com

### Summary

Melissa Wall is a Project Consultant at Transform Consulting Group—a woman-owned, strategic, and data-driven consulting firm focused on serving nonprofits, education, government, & communities.

### Consulting Services/Experiences

#### Research & Analysis

- Led the completion of state and community needs assessment reports after analyzing results from surveys, focus groups, and administrative and programmatic data.
- Assisted in drafting a comprehensive Head Start grantee community needs assessment report after analyzing results from surveys, U.S. Census and other public data sources, and administrative and programmatic data.
- Executed a needs assessment for a government agency requiring collaboration with other agency assessments, collection of program data on capacity and quality, collection of community feedback, and determination of risk and community readiness by county to guide future programming and direction.
- Conducted mixed-methods research studies about the intersection of millennials and philanthropy (alumni giving, volunteering, involvement with causes, etc.).

#### Strategic Planning

- Conducted financial analyses, program evaluations, audience surveys, interviews, and focus groups to inform strategic plans for clients.
- Collaborated with community stakeholders to determine community needs and guide strategic planning and direction through collection and analysis of survey, interview, and focus group data, and facilitating group discussion in creation of a comprehensive community strategic plan.

#### Evaluation

- Evaluated multiple nonprofit programs by soliciting participant feedback and reviewing program data through quantitative and qualitative methods.
- Conducted various evaluations of organizations' corporate social responsibility programs and policies (such as employee giving campaigns).
- Created pre- and post-course surveys for nonprofit management learning series.
- Assessed young professionals' affinity for Indianapolis in study provided to nonprofit and additional sponsors.



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### Fundraising Strategies

- Conducted literature review, market analysis, survey, and interviews to determine fundraising strategies for major campaigns of a nonprofit-public sector collaboration.
- Analyzed fundraising data (donor retention, donor lifetime value, sources of giving, etc.) to determine effectiveness of fundraising campaigns and to inform fundraising strategies.
- Performed feasibility study for capital campaign including a SWOT analysis, environmental scan, and interviews with potential stakeholders.

### Program Development

- Conducted literature review, market analysis, financial analysis, and interviews to determine the viability of a new nonprofit program.

### Project Management

- Lead clients projects from workplan development to execution and completion.
- Provides project management support to the Indiana Early Learning Advisory Committee, creating agenda, meeting summaries, scheduling, and assisting with the creation of project documents.
- Provided project management support for a data integration project between state government agencies and nonprofit organizations.

## Employers

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**Transform Consulting Group**, Project Consultant  
April 2018-Present

**Achieve**, Research Associate  
May 2014 - April 2018

**Indiana University Lilly Family School of Philanthropy**, Graduate Assistant  
August 2013 - May 2014, January 2015 - May 2015

## Education

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**Indiana University**, December 2015  
Master of Public Affairs, Nonprofit Management  
Master of Arts, Philanthropic Studies

**University of Indianapolis**, December 2009  
Bachelor of Music Education



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