

PROPOSAL

PROPOSAL FOR:

**Region 14 Education
Service Center (OMNIA
Partners, Public Sector, Inc.)**

BUSINESS AND IT CONSULTING AND ADVISORY
SERVICES (RFP 25-S944)

SUBMITTED BY:

Berry, Dunn, McNeil & Parker, LLC
2211 Congress Street, Portland, ME 04102

Nicole Becnel

Principal | Berry, Dunn, McNeil & Parker, LLC
nbecnel@berrydunn.com

Proposal Submitted On:

June 19, 2025 before 2 p.m. CST

Section 2 - Pricing

COVER LETTER

June 19, 2025

Region 14 Education Service Center
OMNIA Partners, Public Sector, Inc.
Attn: Evaluation Committee
840 Crescent Centre Drive
Franklin, TN 37067

Submitted via Bonfire at <https://omniapartners.bonfirehub.com/>

Dear Evaluation Committee:

Thank you for the opportunity to respond to Request for Proposals (RFP) 25-S944 for Business and IT Consulting and Advisory Services. Berry, Dunn, McNeil & Parker, LLC (BerryDunn, “we/our”) is pleased to submit this proposal to Region 14 Education Service Center (Region 14 ESC) and OMNIA Partners, Public Sector, Inc. (OMNIA Partners) in response to the RFP.

BerryDunn is a trusted partner to government agencies, non-profits, K-12 and higher education institutions, and other public sector organizations across the United States and its territories. With more than 950 professionals, we bring deep expertise and a proven track record of delivering tailored consulting services that address our clients’ most pressing challenges.

Our team members offer unique perspectives shaped by their experience with our current clients and working within public entities before joining our firm. This insight, combined with our collaborative approach, has consistently helped clients achieve meaningful, measurable results.

With a deep understanding of public sector needs and a strong track record of partnership, BerryDunn is well-positioned to support Region 14 ESC and OMNIA Partners through the following core strengths:

We have experience meeting OMNIA Partners’ needs. Since 2020, BerryDunn has held a Master Agreement with OMNIA Partners for Business and IT Consulting and Advisory Services (Contract # 11-55), resulting in at least 23 projects worth more than \$33 million in sales to date. Through our Master Agreement we have provided a variety of business management and IT consulting services to successfully support numerous public entities across the country and territories. Our work has helped participating agencies save time and money, improve services, and transform processes and operations with innovative solutions. **We greatly value our relationships with Region 14 ESC and OMNIA Partners and welcome the opportunity to continue promoting and leveraging the Region 14 ESC/OMNIA Partners Master Agreement to provide services to member public agencies.**

We bring nationwide public agency experience. BerryDunn has partnered with hundreds of public entities across the country and territories, bringing a national perspective and deep understanding of the systems and operations that support essential services.

We offer a team with deep experience and a high-quality, customized approach for each project. At BerryDunn, our teams are led by accomplished professionals who bring deep experience and hold respected industry certifications. But what truly drives our success is how we work—with our clients, not just for them. We believe the best outcomes come from strong collaboration, so we engage closely with each agency to understand their goals, challenges, and vision. Guided by our Consulting Quality Management (CQM) Program, we strive to make every engagement meet the highest standards. By combining nationally recognized best practices with our own proven methodologies, we deliver solutions that are not only effective but also thoughtfully tailored to each client's unique needs.

As a principal, I am authorized to commit BerryDunn to our proposal and any contractual agreement resulting from the RFP. I am also the individual who is authorized to provide clarification, make decisions, and negotiate a contract on behalf of BerryDunn.

Should you have any questions, my contact information is as follows:

Nicole Becnel | Principal
681.313.8905 | nbecnel@berrydunn.com

After over 35 years of helping clients, **we still appreciate every opportunity and look forward to a continued working relationship with Region 14 ESC and OMNIA Partners.**

We look forward to hearing from you soon.

Sincerely,



Nicole Y. Becnel
Principal | Berry, Dunn, McNeil & Parker, LLC
BerryDunn, 2211 Congress Street, Portland, ME 04102
Tel: 681.313.8905 | Email: nbecnel@berrydunn.com

Section 2 - Pricing

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1.0 Pricing

1.1 Not-to-Exceed Rates

Provide pricing for products, services, warranties, etc. supplier proposes to offer. Suppliers may offer their complete product and service offering or balance of line. Price lists provided will be used to establish both the extent of a supplier's product lines, services, warranties, etc. available from the supplier and the pricing per item. Pricing should be based on a discount from a manufacturer's price list or catalog, or fixed price, or combination of both. Multiple percentage discounts are acceptable if, where different discounts apply, the different percentages are specified. Electronic Catalog and/or price lists should accompany the proposal. Additional pricing and/or discounts may be included. Suppliers may elect to limit their proposals to any category or categories.

a. Any discounts proposed shall remain the same throughout the term of the contract and at all renewal options. At a minimum, the Contractor must hold the proposed price list firm for the first 12 months after the contract award.

b. Pricing is not to exceed. Unlike fixed pricing, the supplier can adjust submitted pricing lower if needed but cannot exceed the approved pricing. The contract must allow for lower pricing to be available for similar product and service purchases. Cost plus pricing as a primary pricing structure is not acceptable. Define the type(s) of Price Models your company is able to provide. The Respondent shall supply price model(s) that are most advantageous to members, auditable, collaborate with participating public agency to produce measurable impacts, reduce risk and easily understood by participating public agency to complete due diligence processes.

BerryDunn proposes not-to-exceed hourly rates (**Table 1**) based on staffing categories in our pricing proposal. We routinely offer rate reductions based on project complexity, the level of expertise required, and the volume of work. Our pricing model is designed to scale with the client's needs, providing flexibility and value. While our rates typically include associated costs, in some cases, travel expenses may be necessary; any such costs will be discussed and agreed upon with the client in advance. Rates are reviewed and adjusted annually to reflect economic conditions and market benchmarks. Should an increase be necessary, we will coordinate with Region 14 ESC or the participating agency's contract manager to review and approve any rate adjustments before implementation.

Table 1: BerryDunn's Proposed Not-to-Exceed Rates

Pricing for all services proposed	
Staff Level	Not-to-Exceed Rate
Principal	\$430
FSA Actuary/PhD Economist	\$380
Senior Manager	\$330
Manager	\$295
Senior Consultant	\$280
Staff Consultant	\$240
Editorial/Quality Assurance	\$150
Paraprofessional	\$80

Our pricing model is designed to support public agencies in effectively planning and managing project costs across quarters and fiscal years. We provide detailed visibility into planned hours and

cost calculations for each deliverable, supporting procurement transparency and due diligence. This structured approach helps mitigate the risk of budget overruns. We clearly define the total budget, scope, timeline, and roles and responsibilities, enabling agencies to manage the engagement efficiently and achieve their objectives within their allocated funding.

BerryDunn agrees to hold our proposed price list firm for the first 12 months after the contract award.

1.2 Third-Party Software

c. Does your organization include third-party software implementation and support? If so, clarify any nuances when it comes to third party software and include price models. Also, include a listing of your third-party partners and software solutions.

BerryDunn does not offer third-party software implementation and support.

1.3 Emergency or Disaster Recovery Situation

d. Due to products and services potentially being used in response to an emergency or disaster recovery situation in which federal funding may be used, if suppliers are proposing cost plus a percentage of cost, suppliers should provide alternative pricing that does not include either cost plus a percentage of cost. If pricing is based on time and materials, a ceiling price that the supplier exceeds at its own risk will be needed as determined and set by the Participating Public Agency. If products and services are provided in a situation where an agency is eligible for federal funding, supplier is subject to and must comply with all federal requirements applicable to the funding including but not limited to the FEMA and Additional Federal Funding Special Conditions section located in the Federal Funds Certifications Exhibit.

1.3.1 Federal Funding and FEMA Compliance

BerryDunn understands that products and services provided under this contract may be used in response to emergencies or disaster recovery situations where federal funding, including FEMA funds, may be applied. In such cases, BerryDunn is committed to compliance with all applicable federal procurement regulations and requirements.

We confirm the following:

- **No Cost-Plus-Percentage Pricing:** BerryDunn does not use cost-plus-a-percentage-of-cost pricing models. Instead, we offer not-to-exceed hourly rates and fixed-price deliverables, which are compliant with federal procurement standards.
- **Ceiling Price for Time-and-Materials:** For time-and-materials engagements, BerryDunn will establish a ceiling price that we will not exceed, in accordance with the requirements of the participating agency.
- **Federal Compliance:** BerryDunn agrees to comply with applicable federal requirements, including but not limited to those outlined in the FEMA and Additional Federal Funding Special Conditions section of the Federal Funds Certifications Exhibit. BerryDunn will work collaboratively with participating agencies to help ensure federally funded engagements are structured and documented to support eligibility and compliance.

2.0 Pricing Structure

Propose the frequency of updates to the supplier's pricing structure. Describe any proposed indices to guide price adjustments. If offering a catalog contract with discounts by category, while changes in individual pricing may change, the category discounts should not change over the term of the contract.

BerryDunn proposes not-to-exceed hourly rates based on staffing categories in our pricing proposal. We routinely offer rate reductions based on project complexity, the expertise required, and the volume of work. Our pricing model is designed to scale with the client's needs, providing flexibility and value. While our rates typically include associated costs, in some cases, travel expenses may be necessary; any such costs will be discussed and agreed upon with the client in advance. Rates are reviewed and adjusted annually to reflect economic conditions and market benchmarks. Should an increase be necessary, we will coordinate with Region 14 ESC or the participating agency's contract manager to review and approve any rate adjustments prior to implementation.

3.0 Affiliates

Describe if distributors/dealers/resellers/subsidiaries/third-party partners ("affiliates") will be used to fulfill the contract. Submit a list of those affiliates authorized to sell under the proposed contract. Where and how does Offeror propose to maintain an authorized affiliate list so it may be accessed by Participating Agencies? How often does the supplier propose to update the affiliate list? Confirm the Offeror reviews the financial health, debarment status and overall general capacity of authorized affiliates. Purchase orders and payment can only be made to the awarded supplier or an approved affiliate and pricing must be less than or equal to the pricing stated herein. Offerors who use authorized affiliates are responsible for ensuring authorized affiliates are performing in accordance with the contract.

BerryDunn has no affiliates associated with this proposal, as defined in the RFP. However, in addition to our core team, we maintain strategic relationships with a network of independent contractors who provide specialized subject matter expertise when needed. If a project requires the engagement of a subcontractor, BerryDunn will follow applicable procedures and obtain prior approval from Region 14 ESC or other participating agencies before assigning the subcontractor to the engagement.

3.1 Selecting Subcontractors

- Subcontractors are typically brought onto a project to provide subject matter expertise or other unique qualifications based on the needs of the project.
- The level of subcontractor involvement varies depending on the engagement, but our goal is to have no more than 40% of work to be performed by subcontractors and typically this percentage is significantly less.
- Our subcontractors that serve as subject matter experts typically have a minimum of 10 years of experience related to their area of expertise, and oftentimes upwards of 20 to 30 years of experience. Prior to engaging subcontractors, we verify their qualifications and quality of work through various means, including but not limited to conducting reference checks, reviewing work samples, conducting interviews, and conducting background checks.
- Our subcontractors who serve as subject matter experts typically have experience working as a state government employee and/or as a contractor to government agencies. In addition, many of our subcontractors bring relevant private-sector experience to their role as subject matter expert.

- BerryDunn is committed to working with small, minority, women-owned, and other disadvantaged businesses—both in our professional engagements and in the communities in which we work. We have established processes for recruiting, networking, and maintaining relationships with disadvantaged businesses.

3.2 Managing Subcontractors

- Subcontractors work under the direction of BerryDunn’s project manager.
- Subcontractors are required to participate in BerryDunn’s established subcontractor orientation process, which helps to ensure that subcontractors have all of the tools and information necessary to perform their work and fully integrate with the BerryDunn team, thereby being seamless to the client.
- Subcontractors are required to follow all BerryDunn policies and procedures as related to the project they are performing, including our established quality assurance procedures.
- BerryDunn’s project manager will monitor the performance of subcontractor(s) throughout the course of each engagement to help ensure that the subcontractor’s performance meets BerryDunn’s and the client’s expectations.
- If issues arise with the subcontractor’s performance, the BerryDunn project manager will address the issue in writing and work with the subcontractor to develop a plan of action for resolving the issue to help ensure the participating agency is not affected by a subcontractor’s nonperformance.
- BerryDunn’s project manager will serve as the primary point of contact with participating agencies, including for all contract-related issues, regardless of whether the issue stems from BerryDunn’s staff or subcontracted personnel. BerryDunn will be accountable for all work performed by our subcontractors.

4.0 Special Offers

Describe any special offers, promotions, additional discounts or rebates offered. Additional discount or rebates may be offered for large quantity purchases, single ship to location programs, growth, annual spend, guaranteed quantity, etc.

BerryDunn does not offer products or commoditized services that special offers, promotions, additional discounts rebates, or similar terms would apply to. For services using our not-to-exceed rates, we routinely offer rate reductions based on project complexity, expertise required, and the volume of work. Our pricing model is designed to scale with the client's needs, providing flexibility and value.

5.0 Leasing/Financing Programs

Describe any Leasing/Financing programs.

BerryDunn does not provide leasing or financing programs. BerryDunn can offer our range of Business and IT Consulting and Audit, Tax, and Accounting services through this contract as it exists. In the event a new subservice or service offering outside of these services is provided, we will engage with Region 14 ESC or the participating agency’s contract manager to determine the best course of action to offer the service. Our contract rates will apply to the new service to help assure participating agencies they are receiving services at a competitively procured rate.

6.0 Verifying Correct Contract Pricing

Describe how customers verify they are receiving the correct contract pricing.

We are committed to ensuring that participating agencies receive fair and accurate contract pricing by rigorously adhering to our not-to-exceed hourly rate structure. Through our proactive internal review process, we validate current contract rates for every consulting service request, clearly communicate those rates to the agency, and strategically incorporate them into statements of work. This approach promotes transparency and accountability and helps ensure that every engagement is aligned with measurable, results-driven deliverables.

7.0 Invoicing Process

Describe supplier's invoicing process. Include payment terms and acceptable methods of payments. Suppliers shall describe any associated fees pertaining to credit cards/p-cards.

At BerryDunn, we work closely with our clients to establish appropriate billing milestones and define any specific information or formatting requirements to meet their needs. We typically issue monthly invoices based on the work completed or deliverable.

Our standard payment terms are net 30 days. We accept payments via check, ACH, and credit card, with no additional fees for credit card payments made through our website.

8.0 Future Product Introductions

Describe how future product introductions will be priced and align with contracting pricing proposed.

BerryDunn proposes consulting services rather than products to meet the needs of this contract. As such, future product introductions are not applicable.

BerryDunn's service offerings and capabilities evolve to meet emerging needs. In the event a new subservice or service offering outside of the services detailed in this proposal is offered, we will engage with Region 14 ESC or the participating agency's contract manager to determine the best course of action to offer the service. Our contract rates will apply to the new service to help assure participating agencies they are receiving services at a competitively procured rate.

9.0 Additional Information

9.1 Confidential Information Contained Within Proposal

As a privately owned firm, BerryDunn respectfully requests that the entirety of this document, Section 2 – Pricing, is kept confidential. As indicated in the RFP (page 7, Section III, Item 7) and Q&A (page 3, Questions 17 and 19), we are also submitting a redacted copy of Section 2 – Pricing.

This document is exempt from disclosure under Texas § 552.110(c) as it contains financial information that disclosure would cause substantial competitive harm to our privately owned firm.

“BerryDunn” is the brand name under which Berry, Dunn, McNeil & Parker, LLC and BDMP Assurance, LLP, independently owned entities, provide professional services in an alternative practice structure in accordance with the AICPA Code of Professional Conduct. BDMP Assurance, LLP is a licensed CPA firm that provides attest services, and Berry, Dunn, McNeil & Parker, LLC, and its subsidiary entities provide tax, advisory, and consulting services.

The entities falling under the BerryDunn brand are independently owned and neither entity is liable for the services provided by the other entity. Our use of the terms “our firm” and “we” and “us” and terms of similar import denote the alternative practice structure of Berry, Dunn, McNeil & Parker, LLC and BDMP Assurance, LLP.

This proposal is the work of Berry, Dunn, McNeil & Parker, LLC and is in all respects subject to negotiation, agreement, and signing of specific contracts.

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