


Curriculum Vitae (CV) James R. Westrick see ([www.westrick.com](http://www.westrick.com))

<p><b>1.Name:</b> James R Westrick</p> <p>(Picture 2013 Bishkek, Kyrgyzstan)</p>	 <p>James R Westrick</p>
<p><b>2. Date of Birth</b></p>	<p>» April 7, 1936 (Excellent Health)</p>
<p><b>3. Nationality</b></p>	<p>» USA</p>
<p><b>4. Education</b></p>	<p>» Master Business Administration (MBA), University of Florida 1961 » Bachelor of Business Statistics (B.S.), Indiana University 1958</p>
<p><b>5. Membership PA</b></p>	<p>ACM</p>
<p><b>6. Other Training</b></p>	<p>QPR Business Processing, Microsoft VB, C, 4GL, multiple programming languages, SQL, Informix, Oracle, PostgreSQL MySQL, MsSQL databases, Program Management</p>
<p><b>7. Countries of Work Experience: (Last 10 years in emphasis)</b></p>	<p>USA, Bosnia, Chile, <b>Costa Rica, Columbia, Ecuador, El Salvador, Guatemala, Honduras, Jamaica, Kosovo, Kazakhstan, Kyrgyzstan, Liberia, Moldavia, Macedonia, Nicaragua, Philippines, Paraguay, Sao Tome, Tajikistan, Tanzania</b>, Ukraine and Uruguay.</p>
<p><b>8. Languages</b></p>	<p>English – Native, Spanish - Native, Russian – Level 1</p>
<p><b>9. Employment Record</b></p>	<p><b>From</b> Jul 2014 – Aug 2014 (Philippines) (Total of 9 weeks) <b>Employer:</b> Millennium Challenge Corporation <b>Position held:</b> Project Management Consultant for eTIS ICT project for Philippine Tax Administration</p>
	<p><b>From</b> Jan 2013 – Mar 2014 (Philippines) (Total of 4 weeks) <b>Employer:</b> Millennium Challenge Corporation <b>Position held:</b> Evaluator for multiple ICT proposals for Philippine Tax Administration including eTIS-1 and Change Management</p>
	<p><b>From</b> May 2009 – Oct 2013 (Kyrgyzstan-Tajikistan) ( Total of 10 months) <b>Employer:</b> Asian Development Bank <b>Positions held:</b> Intermittent International ICT &amp; Tax Advisor (Kyrgyzstan and Tajikistan)</p>
	<p><b>From</b> June 2010 – 2013 (Jamaica) (Total of 10 months) <b>Employer:</b> CARANA Corporation <b>Positions held:</b> Intermittent International ICT &amp; Tax Advisor</p>
	<p><b>From</b> Feb 2002 – Mar 2011 (Total of 8 years) <b>Employer:</b> US Treasury Office of Technical Assistance <b>Countries:</b> Bosnia, Columbia, Ecuador, El Salvador, Guatemala, Honduras, Liberia, Macedonia, Nicaragua, Paraguay, Sao Tome y Principe <b>Positions held:</b> Intermittent ICT and Tax Administration Advisor</p>
	<p><b>From</b> June 1998 – June 1999 <b>Employer:</b> SAIC Columbia <b>Positions held:</b> Installation Manager IT Banco Credito Bogata, Columbia</p>
	<p><b>From</b> Jan 1990 – April 1997 <b>Employer:</b> Deloitte, Barents International (KPMG) <b>Countries:</b> Bosnia, El Salvador, Guatemala, Kosovo, Thailand, Ukraine <b>Positions held:</b> ICT and Tax Advisor</p>
	<p><b>From</b> Jan 1990 – April 1997 <b>Employer:</b> Deloitte, Barents International (KPMG) <b>Countries:</b> Bosnia, El Salvador, Guatemala, Kosovo, Thailand, Ukraine <b>Positions held:</b> ICT and Tax Advisor</p>

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	<p><b>From</b> Sept 1986 – July 1989  <b>Employer:</b> Omnimax International (USAID Contractor)  <b>Countries:</b> Ecuador  <b>Positions held:</b> ICT and Tax Advisor</p>
	<p><b>From</b> Oct 1976 – August 1986  <b>Employer:</b> Owner and Project Manager of IT firm Westrick &amp; Associates  <b>Countries:</b> Guatemala, El Salvador, Panama  <b>Positions held:</b> Project Manager of the following: (Empresa Electrica, GuaTel, Banco de Trabajadores, Empresa Municipal de Agua, Cervesaria Central Americana en Guatemala) and Banco Nacional de Panama)</p>
	<p><b>From</b> Sept 1967 – Sept 1976  <b>Employer:</b> Internal Revenue Service (IRS-USA) Office of Technical Assistance  <b>Countries:</b> Chile, Uruguay, Guatemala  <b>Positions held:</b> ICT and Tax Advisor Ministry of Finances &amp; LAFTA (Latin American Free Trade Association, Uruguay)</p>
	<p><b>From</b> May 1961 – Sept 1967  <b>Employer:</b> RCA Computer Division  <b>Cities USA:</b> Atlanta, Pensacola, Washington DC  <b>Positions held:</b> ICT Programmer, Analyst, Project Manager. Southern Bell, Grady Memorial Hospital, Naval Air Stations, Ship Systems Command</p>
<p><b>10. Work Undertaken that Best Illustrates Capability to Handle the Tasks Assigned</b></p>	<p><b>Millennium Challenge Corporation:</b> Was an Independent Evaluator of ICT RFP proposals for the Millennium Challenge Corporation (MCC) in the Philippines. Was an Independent Evaluator for the awarding Electronic Tax Information System (eTIS-1) in Feb 2013. Was also an Independent Evaluator for the awarding of the “MCA-Philippines: Request for Proposals for Consultant’s Services for Change Management for the Implementation of the Electronic Tax Information System (eTIS)” Feb-March 2014. Worked as Project Management Consultant for MCC on eTIS project during July-August 2014 and advised MCC that project could not meet its long term goals of installation in all (124) tax agencies with existing software selection.</p>
	<p><b>Asian Development Bank:</b> Evaluated the 2009 existing ICT system in the State Tax Office (STS) Republic of Kyrgyz. Determined it’s benefits and deficiencies. Determined that a complete new system was needed but with proper conversion capabilities. Developed the RFP for the State Tax Office in 2009 for a new Integrated Tax Administration System (ITAS). RFP was in accordance to World Bank and Asian Development Bank Standards. The RFP consisted of (9) Sections and (4) Annexes. Section VI, the Schedule of Requirements was directly under my responsibility but based on the new Business Procedures developed by other advisors. Developed a short term and long term plan for ICT hardware deployment throughout the Republic. Specified intermediate hardware and software configurations for 56 tax offices and developed the RFP’s and evaluation to purchase the necessary equipment. Led the evaluation team for the RFP software proposals for the new Integrated Tax Administration System (ITAS) 2010. Evaluation of all the hardware bids for Asian Development Bank. Did the consultant follow-up for implementation of the ITAS system and evaluation of ITAS vender contract implementation during 2011-2012 including conversion from the previous TAS system to the new ITAS which required a database change from Informix to MsSQL and from a client/server to a web based system. Worked with contractor on developing program modules of ITAS, particularly in VAT, Rule Based Systems and Case Tracking Systems. Worked as a mediator between the contractor, State Tax Office and Asian Development Bank on implementation and defining responsibilities of each party. Returned several times in 2013 for follow up on module acceptance and final close out of implementation of new ITAS system country wide. (September-October 2013). Visited ITAS installations throughout the Republic to test results of ITAS implementations. Made recommendations on communications, manpower, operator training, programming changes and change management implementation throughout the country.</p> <p><b>Activities performed:</b></p> <ul style="list-style-type: none"> <li>» Developed Position Papers creating a Unique Identification System which would combine the Social Fund Number, the Tax Identification Number and the Statistical Number for all entities within the country.</li> <li>» Developed the RFP for the ITAS system using World Bank and Asian Development Bank procedures.</li> <li>» Headed the evaluation of the RFP’s and the rewarding of the contract for the ITAS system.</li> </ul>

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	<ul style="list-style-type: none"> <li>» Reviewed all activities and development of the contracted provider for the ITAS system.</li> <li>» Reviewed technical specifications for all modules.</li> <li>» Developed detailed specifications for the Rule Base System for all data entry and worked with contractor in the ITAS development and implementation of the same.</li> <li>» Developed detailed specifications for the Case Tracking System.</li> <li>» Am on call for the Asian Development Bank final review of the ITAS system in 2014.</li> </ul>
	<p><b>Asian Development Bank:</b> Developed the costing document for the new State Tax Office of Tajikistan to implement a new IT reorganization along international best practices and new functional business processes for the State Tax Committee.</p> <p><b>Activities performed:</b></p> <ul style="list-style-type: none"> <li>» Document included schedules, employment, training, reorganization, computerization of a new tax office based on best international practices applicable to the Tajikistan environment and manpower availability.</li> <li>» Developed a needs assignment for immediate procurement for State ICT Office by ADB.</li> <li>» This document is being used as the guide line for the start of the reorganization effort in 2013 and funding by World Bank.</li> </ul>
	<p><b>Intermittent Advisor CARANA Corp: Jamaican Tax Administration.</b></p> <p>Helped developed the costing documents for the new Tax Authority Jamaica (TAJ) as an IMF requirement (2010). Was responsible for the costing of all IT components in the start up of the TAJ. The costing document was used to justify a \$50 million USA loan agreement between the Inter-American Development Bank and the Jamaican Government (2011). Design overall approach in developing the new Business Practices for the TAJ that was included in the RFP for new tax software for the TAJ. Introduced QPR Business Processing software for developing business flows and gave classes in its use to TAJ analysts. All business processes were developed with this method including VAT. Developed the interface ICT systems needed to connect the new ITAS system to legacy IT systems including the Customs Office and develop a conversion strategy that was part of the RFP. Since all outside government agencies rely on the TAJ tax office central identification system and the TAJ also acts as the general collection agency for Country, Department and City agencies, general interfaces must be in place for any new general tax system. Help evaluate if Custom Off The Shelf (COTS) Integrated Tax Administration System could provide for better reliable ICT tax administration than customized programming and if such systems could maintain the outside ICT interfaces needed by other government agencies. Managed the team writing the RFP for the new Custom Off The Shelf (COTS) Integrated Tax Administration System according to World Bank and Inter-American Development Bank procedures. Developed intermediate hardware requirements for all local tax offices. Visited field offices and made recommendations on staffing and hardware upgrades. Re-evaluated present server back-up location and developed plans for new backup centre away from costal area. I-ADB is financing the project. Participated as a Team in the bidding evaluation and selection of the COTS system (2013). Contract was awarded to FAST Enterprise software GenTax in January 2014.</p> <p><b>Activities performed:</b></p> <ul style="list-style-type: none"> <li>» Helped developed the costing documents for the new Tax Authority Jamaica (TAJ) as an IMF requirement.</li> <li>» Responsible for the costing of all ICT components in the start up of the TAJ.</li> <li>» Design overall approach in developing the new Business Practices for the TAJ that was included in the RFP for new tax software for the TAJ.</li> <li>» Introduced QPR Business Processing software for developing business flows and gave classes in its use to TAJ analysts.</li> <li>» All business processes are now being developed with this method.</li> <li>» Wrote the interface descriptions of the legacy software that must interface with the new ITAS system that was included in the RFP.</li> <li>» Managed the team that wrote the RFP according to the World Bank and Inter-American Development Bank procedures. RFP was published 2013 for a COTS integrated tax system.</li> <li>» Was part of the evaluation team of the RFP proposals for ITAS 2013. Contract awarded beginning 2014.</li> </ul> <p>Financing for Jamaica is by Inter-American Development Bank.</p>
	<p><b>US Treasury Office of Technical Assistance:</b> Worked in Business processes and computerization on short term assignments (2-9 months each) in Bosnia, Liberia, Guatemala, Honduras, El Salvador, Paraguay, Sao Tome y Principe.</p> <ul style="list-style-type: none"> <li>» Evaluation of Hardware and software systems</li> <li>» Develop bidding documents.</li> </ul>

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	<ul style="list-style-type: none"> <li>» Evaluation of all bids</li> <li>» Recommendations on Tax Payer Identification Systems and new VAT system</li> <li>» Cost analysis of software implementation</li> </ul>
	<p><b>Name of assignment or project:</b> IT and Tax Administrations Development (US Treasury)  <b>Year:</b> 2008  <b>Location:</b> Sao Tome y Principe  <b>Client:</b> Government of Sao Tome (Millennium Challenge Project w/US Treasury)  <b>Main project features:</b> Development of the Taxpayer Identification Number System  <b>Positions held:</b> Consultant  <b>Activities performed:</b></p> <ul style="list-style-type: none"> <li>» Developed the new Taxpayer Identification Number</li> <li>» Developed programs for the conversion from the old system to the new TIN</li> <li>» Configured the computer system for the Tax offices and Customs areas</li> <li>» Specified all hardware and software for the IT installation in the Customs and the Tax Administration areas.</li> <li>» Review proposals and selected equipment.</li> <li>» Did server installations in Customs using Red Hat Linux</li> <li>» Did server Installations in the Tax Office using Microsoft SQL Server</li> <li>» Wrote validation programs for central bank payments.</li> </ul>
	<p><b>Name of assignment or project:</b> Business process reengineering (US Treasury)  <b>Year:</b> 2004  <b>Location:</b> Liberia  <b>Client:</b> Government of Liberia (US Treasury)  <b>Main project features: Positions held:</b> Business process reengineering  <b>Activities performed:</b></p> <ul style="list-style-type: none"> <li>» Reengineered the basic business practices between the Ministry of Finance, Customs, Internal Revenue, and the Central Bank and implemented a new mechanized fiscal payment and accounting system linking the Ministry of Finance, Customs Office, Central Bank and Bureau Veritas BIVAC Group Paris (an international customs pre inspections service of the French government) for all tax payments, control and reconciliation with actual bank deposits.</li> <li>» This led to a 60% increase in tax revenues during the first year of the systems implementation and over a 4 fold increase in revenues in 2 years.</li> <li>» Wrote hardware and software equipment specifications for server systems including backup at Central Bank Offices, Installation at Air Port Customs, General Customs, Ministry of Finance central server systems.</li> <li>» Wrote 30% of the programs personally, particularly in Customs area.</li> </ul>
	<p><b>Name of assignment or project:</b> Reengineering and redesign Tax Office (US Treasury)  <b>Year:</b> 1999  <b>Location:</b> Bosnia  <b>Client:</b> Government of Bosnia  <b>Main project features:</b> complete re-engineered and redesign of the National Business Number issued by the Statistical and Tax Departments  <b>Positions held:</b>  <b>Activities performed:</b></p> <ul style="list-style-type: none"> <li>» Worked with all entities (Bosnian, Croatian, Serbian) in the Ministries of Statistics, Justice, Finance (Tax) in constructing the legal and technical details between entities and ministries in developing their new business processes.</li> <li>» The unified Business Number was National Wide Number approved and installed in all entities in Bosnia.</li> <li>» Wrote the initial business registration system in client/server with SQL database.</li> </ul>

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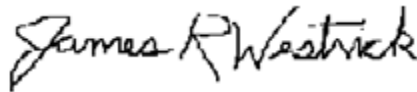
	<p><b>Name of assignment or project:</b> Transit Control System and Conversion of Tax Administration System Guatemala (US Trade &amp; Development Agency Project)</p> <p><b>Year:</b> 2008</p> <p><b>Location:</b> Guatemala</p> <p><b>Client:</b> Government of Guatemala</p> <p><b>Main project features:</b> Project management of the implementation of a Transit Control System and Conversion of Tax Administration System</p> <p><b>Positions held:</b> Project Manager</p> <p><b>Activities performed:</b></p> <ul style="list-style-type: none"> <li>» Developed basic proposal, selected local programmers and headed team of third country nationals that designed, developed and installed a GPS tracking system in Guatemala for the control of transit containers from border to border.</li> <li>» Project was finished on time (7 months) and within budget for the USTDA. Guatemala Custom and Tax Office (SAT). Project is now being reevaluated and updated for potential implementation in 2014.</li> </ul>
	<p><b>Name of assignment or project:</b> Various IT Consulting Projects for US Treasury &amp; World Bank</p> <p><b>Year:</b> 2001 2002 2004</p> <p><b>Location:</b> Tanzania, Liberia</p> <p><b>Client:</b> Various</p> <p><b>Main project features:</b> Managing IT World Bank IT projects</p> <p><b>Positions held:</b> Project Manager</p> <p><b>Activities performed:</b></p> <ul style="list-style-type: none"> <li>» Develop RFP for Tanzania MicroFinance Bank for new central banking package using World Bank standards and procurement. Led a 2 man team that converted a 15 year old ICL proprietary banking systems to Open Systems Linux and Micro Focus COBOL using latest Intel platform vrs risc servers. This Financial Banking System was used in 80% of the branches of the bank and interfaced with the central banking system in the RFP. Conversion included (1174) COBOL programs and over (280) shell scripts. Conversion was done in South Africa Micro Focus Conversion Center and in Tanzania with the assistance of an international Linux expert. (3 months 2001).</li> <li>» Also help develop an analysis of establishing a Credit Bureau for the Central Bank in Tanzania in 2007</li> <li>» Liberia Central Bank-Ministry of Finance-Customs Office: In Liberia helped head the project that connected the Ministry of Finance and the Central Bank for receipt processing and reconciliation financial accounting system. Project was done through the Office of Technical Assistance US Treasury with all financing by USAID for equipment and sub contractors.</li> <li>» In Liberia developed a Customs database from Bureau Veritas BIVAC Group, an International pre-shipment company that reports on values and contents of goods being shipped to Liberia. This is used to establish a minimum value per container for customs. This is later compared to Central Bank receipts to validate actual tax payments as customs is being cleared. This system has produced over a 100% increase in tax collections since it's implementation in January 2006. Also returned in 2009 for system expansion. Developed the individual identification system that was used in the election of October 2005 and become the Tax Identification in the new government administration.</li> </ul>
	<p><b>Name of assignment or project:</b> Tax administration reform</p> <p><b>Year:</b> 2002 – 2004</p> <p><b>Location:</b> El Salvador, Nicaragua</p> <p><b>Client:</b> Government of El Salvador, Nicaragua</p> <p><b>Main project features:</b></p> <p>Lead IT consultant for BearingPoint to develop a linked database system for financial accounting auditing purposes and the establishment of a computerized auditing program for the Tax Administration of El Salvador</p> <p><b>Positions held:</b> Consultant</p> <p><b>Activities performed:</b></p> <ul style="list-style-type: none"> <li>» Preparation of all procurement documents and USAID, IRMU approval. Use a 4 CPU RISC computer in n-tier configuration with Linux operating system for data warehousing. Wrote specification and evaluated all bids.</li> </ul>

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	<ul style="list-style-type: none"> <li>» Conversion of 200 million record Alpha database system using Informix 7.3 to latest version of IBM Informix 9.4 on Intel hardware using SuSE Linux Advanced Server. This conversion of the El Salvador Tax Administration was featured by IBM on their website (first to use Informix 9.4) and also SuSE web site as outstanding implementations of IT technology.</li> <li>» Developed a report for Nicaragua tax office on revalidation of taxpayer identification system and using GPS for determining taxpayer directions.</li> </ul>
	<p><b>Name of assignment or project:</b> Tax Administration UN Kosovo  <b>Year:</b> 1999 – 2000  <b>Location:</b> Kosovo  <b>Client:</b> UN USAID/Project  <b>Main project features:</b> Developing the IT function for the new Kosovo Tax Administration  <b>Positions held:</b> Manager IT Tax Office  <b>Activities performed:</b></p> <ul style="list-style-type: none"> <li>» Tax Department was established in the territory of Kosovo for United Nations Interim peace keeping mission.</li> <li>» This included establishing the national numbering system for businesses, individuals, and non government agencies.</li> <li>» Selected all personnel</li> <li>» Specified computerized hardware and software for procurement.</li> <li>» Analysed all bids and selected hardware servers and all PC's</li> <li>» Directed all programmers</li> <li>» Implementation of master tax database and first revenue accounting.</li> </ul>
	<p><b>Name of assignment or project:</b> Owner and Manager of Westrick &amp; Associates Guatemala  <b>Year:</b> 1975-1986  <b>Location:</b> Guatemala  <b>Client</b> City Electric Company, National Telephone Company, Municipal Water Company, Largest (63) company conglomerate in Guatemala  <b>Main project features:</b> Developing the initial IT function for all organizations including full billing and accounting  <b>Positions held:</b> Manager IT Company providing turn key operations to all of the above organizations until Guatemalan Civil War force evacuation  <b>Activities performed:</b> Employed managers, analysts, programmers and acted as IT director for the above institutions in establishing their initial IT departments and IT billing and accounting systems.</p>
	<p><b>Name of assignment or project:</b> ICT and Tax Administration Advisor IRS-USA  <b>Year:</b> 1967-1975  <b>Location:</b> USA, Chile, Uruguay, Guatemala  <b>Client</b> Worked in Chile, Uruguay, Guatemala as the IT Advisor on (4) man tax teams helping Latin American countries implement tax identification and computerized systems particularly in income tax area.  <b>Main project features:</b> Developing the Taxpayer Identification Number in Chile and Guatemala. Purchased the initial computers for Ministry of Finance in Guatemala and developed the initial IT department and initial systems including Income, VAT, Property and Vehicle applications.  <b>Positions held:</b> Country IT Advisor for IRS-USAID Tax Teams  <b>Activities performed:</b> Organized IT departments, trained personnel, specified and procured equipment, designed Tax systems, programmed pseudo database systems, developed and used terminal technologies and strategies for on-line systems.</p>
<p><b>11. References:</b></p>	<p><b>Ruben Barreto</b>  Financial Sector Specialist  Public Management, Financial Sector and Trade Division  Central and West Asia Department  Asian Development Bank</p>

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	<b>Paul Goldberg</b> Retired IRS Executive and former Tax Project Manager US Treasury E-mail: <a href="mailto:Cctsbuddy@aol.com">Cctsbuddy@aol.com</a>
	<b>John Ramos</b> Retired IRS Executive and former Barents/Deloitte Tax Project Manager Tel 1-813-908-9049 E-Mail <a href="mailto:jmram@verizon.net">jmram@verizon.net</a>
<b>12. Certification:</b>	I, the undersigned, certify that to the best of my knowledge and belief, this CV correctly describes me, my qualifications, and my experience. I understand that any wilful misstatement described herein may lead to my disqualification or dismissal, if engaged.
	I, the undersigned, hereby declare that I agree to participate in the above-mentioned assignment, I further declare that I am able and willing to work for the period foreseen in the above reference Request for Consultants' Qualifications.



\_\_\_\_\_ DATE

Feb 14, 2015

James R. Westrick

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