



Department of Administration
Purchasing Division
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

State of West Virginia Delivery Order

Order Date: 05-17-2022

CORRECT ORDER NUMBER MUST APPEAR
ON ALL PACKAGES, INVOICES, AND
SHIPPING PAPERS. QUESTIONS
CONCERNING THIS ORDER SHOULD BE
DIRECTED TO THE DEPARTMENT
CONTACT.

Order Number:	CDO 0506 2947 EPS2200000001 1	Procurement Folder:	1043917
Document Name:	ELC ED and EDE Reporting Support & Data Modernization Initia	Reason for Modification:	
Document Description:	ELC ED and EDE Reporting Support & Data Modernization Initia		
Procurement Type:	Central Delivery Order		
Buyer Name:	Crystal G Hustead		
Telephone:	(304) 558-2402		
Email:	crystal.g.hustead@wv.gov		
Shipping Method:	Best Way	Master Agreement Number:	CMA 0511 HHR2100000003 1
Free on Board:	FOB Dest, Freight Prepaid		

VENDOR	DEPARTMENT CONTACT																				
Vendor Customer Code: 000000100150 BERRY DUNN MCNEIL & PARKER LLC 2211 CONGRESS ST PORTLAND ME 04102 US Vendor Contact Phone: 6813138905 Extension: Discount Details: <table><thead><tr><th></th><th>Discount Allowed</th><th>Discount Percentage</th><th>Discount Days</th></tr></thead><tbody><tr><td>#1</td><td>No</td><td>0.0000</td><td>0</td></tr><tr><td>#2</td><td>No</td><td></td><td></td></tr><tr><td>#3</td><td>No</td><td></td><td></td></tr><tr><td>#4</td><td>No</td><td></td><td></td></tr></tbody></table>		Discount Allowed	Discount Percentage	Discount Days	#1	No	0.0000	0	#2	No			#3	No			#4	No			Requestor Name: Jodie F Miller Requestor Phone: (304) 356-4057 Requestor Email: jodie.f.miller@wv.gov 22 FILE LOCATION _____
	Discount Allowed	Discount Percentage	Discount Days																		
#1	No	0.0000	0																		
#2	No																				
#3	No																				
#4	No																				

INVOICE TO	SHIP TO
PURCHASING DIRECTOR 304-356-4116 HEALTH AND HUMAN RESOURCES BPH - SURVEILLANCE AND DISEASE CONTROL 350 CAPITOL ST, RM 125 CHARLESTON WV 25301-3715 US	PURCHASING DIRECTOR 304-356-4116 HEALTH AND HUMAN RESOURCES BPH - SURVEILLANCE AND DISEASE CONTROL 350 CAPITOL ST, RM 125 CHARLESTON WV 25301-3715 US

Total Order Amount: \$381,175.00

Purchasing Division's File Copy

CH 5/18/22

PURCHASING DIVISION AUTHORIZATION
DATE: *Linda Harper 5/18/22*
ELECTRONIC SIGNATURE ON FILE

ENTERED

ENCUMBRANCE CERTIFICATION
DATE: *Beverly Tolson 5-18-22*
ELECTRONIC SIGNATURE ON FILE

Extended Description:

Project Management for OEPS ELC ED and EDE Reporting Support & Data Modernization Initiative
Services 06/01/22 - 08/31/23
Per attached Statement of Work

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$13,975.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-06-01	2023-08-31				

Commodity Line Description: Lead Project Manager: Base Year One

Extended Description:

Lead Project Manager: Base Year One

Hourly Rate: \$215.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$268,800.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-06-01	2023-08-31				

Commodity Line Description: General Project Manager: Base Year One

Extended Description:

General Project Manager: Base Year One

Hourly Rate: \$175.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$96,240.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-06-01	2023-08-31				

Commodity Line Description: Project Management Support Staff: Base Year One

Extended Description:

Project Management Support Staff: Base Year One

Hourly Rate: \$80.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
5	80101600	0.00000		\$0.0000	\$2,160.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-06-01	2023-08-31				

Commodity Line Description: Engagement Manager: Base Year One

Extended Description:

Engagement Manager: Base Year One

Hourly Rate: \$270.00



April 20, 2022

To Whom It May Concern:

BerryDunn submitted a Staffing Plan and Scope of Work (SOW) document to the Department of Health and Human Resources, Bureau for Public Health, to provide Epidemiology and Laboratory Capacity (ELC) Enhancing Detection (ED), ED Expansion (EDE), and Data Modernization Initiative support services, under our contract (HHR 21*3). As stated in the SOW document, the duration of this work is estimated to be 15 months. BerryDunn agrees to a SOW start date effective June 1, 2022. The work would then conclude on August 31, 2023.

Please let me know if you have any questions or if you would like to discuss the content in this SOW.

We are pleased to have the opportunity to continue provide these important services to the State of West Virginia.

Best Regards,

A handwritten signature in cursive script that reads 'Nicole Y. Becnel'.

Nicole Y. Becnel
Principal
681.313.8905

Ok

A handwritten signature in cursive script that reads 'Althea Greenhouse'.



ELC ED and EDE Reporting Support and Data Modernization Initiative

Staffing Plan and Scope of Work

Prepared for HHR 21*3

Submitted by:

Nicole Becnel, PMP®, Contract Manager
Charlie Leadbetter, PMP®, Project Principal
Julie Sullivan, MPH, MBA, PMP®, Program Manager
BerryDunn
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Charleston, WV 25301 | 681.313.8905
nbecnel@berrydunn.com
cleadbetter@berrydunn.com
jsullivan@berrydunn.com

Submitted on:

April 20, 2022

berrydunn.com

Staffing Plan and Scope of Work For ELC ED and EDE Reporting Support and Data Modernization Initiative

1.0 Key Information

The intent of this Scope of Work (SOW) is to help ensure a common understanding of expectations as they relate to the deliverables and services BerryDunn will provide for Epidemiology and Laboratory Capacity (ELC) Enhancing Detection (ED), ED Expansion (EDE), and Data Modernization Initiative (Data Mod) for the West Virginia (WV) Department of Health and Human Resources (DHHR), Bureau for Public Health (BPH). The SOW describes the activities BerryDunn will undertake to support BPH with project management, grants management and reporting, and planning and implementation of the Data Modernization Initiative.

BerryDunn will complete this work in accordance with the terms and conditions of the base contract between BerryDunn and WV DHHR.

1.1 Background Information

As a result of the COVID-19 pandemic, federal funding for public health increased significantly, and there were several new funding streams created under the ELC umbrella. In order to manage this expansion in funding, BPH asked BerryDunn to provide project management support for the ED and EDE grants beginning in January 2021. The majority of BerryDunn's work has focused on creating and implementing a reporting strategy for local health departments.

With the more recent Data Modernization funding, BerryDunn supported the creation of the Public Health Data Governance Steering Committee and Data Stewards Council, completed the CDC-required baseline assessment, developed recommendations from the assessment findings, and is currently working on the draft vision and mission statements. The next steps include finalizing the prioritization of recommendations, developing an implementation plan, and delving into a workforce assessment and plan.

1.2 Assumptions

BPH has requested that BerryDunn continue to support ED and EDE reporting as well as moving forward with the next steps in the Data Modernization Initiative.

BerryDunn made the following assumptions in preparing this SOW:

- The work will begin upon approval of this SOW. The project is intended to continue through approximately July 31, 2023, to see the grants through to completion.
- The BPH leadership team will consist of Amy Atkins as the Project Sponsor and Kathy Cummons and Michelle Neidig as Project Leads.
- The BerryDunn leadership team will consist of Nicole Becnel as Contract Manager, Charlie Leadbetter as Project Principal, and Julie Sullivan as Program Manager.
- BPH will maintain a Google Drive site for project artifacts, deliverables, and document sharing.
- BerryDunn will provide deliverables in an agreed-upon format.
- The BPH Project Sponsor and Project Lead will provide timely decision-making and responses to information and scheduling requests from the BerryDunn project team.
- To maximize the efficiency of meetings, BerryDunn assumes that participants will come to meetings prepared. This includes an advance review of meeting materials to support the goal(s) of the meeting.
- BerryDunn will prioritize working collaboratively with BPH staff and leadership such that knowledge and best practices are transferred to build BPH staff capacity.

2.0 Project Scope and Staffing Plan

Table 1 describes the service approach, deliverables, and acceptance criteria for BerryDunn's work; identifies BerryDunn team members responsible for conducting the work; and lists the estimated hours for completion of each key task. A high-level timeline for the activities described below is provided in Section 4.0.

Table 1: Service Approach, Deliverables, and Completion Criteria

Ref #	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
1.0	Engagement Oversight <i>Service Approach</i> 1.1 BerryDunn's project leadership team will provide quality assurance for the entire engagement as well as for deliverables and will meet on an ongoing basis to manage BerryDunn staff performance. 1.2 BerryDunn's project team will meet with the Project Sponsor on a monthly basis to discuss project progress, risks and issues and decisions. 1.3 BerryDunn's project team will meet on a weekly basis internally and with the Project Leads to help ensure project progress, identify risks and issues, decisions and address action items. <i>Deliverables</i> D01 Monthly Project Status Updates D02 Weekly Project Status Updates D03 Project Meeting Agendas and Notes D04 Action Item, Risk and Issue, and Decision Logs <i>Completion Criteria</i> Engagement Oversight will be deemed complete following the D10 Project Closeout Meeting.	Nicole Becnel Charlie Leadbetter Julie Sullivan April Adames Arwa Alniemi Julie Cox-Kain Erica Hoffman Becki Moore Andrew Oliver Melissa Payne Makah Sesay Luci Veilleux Caitlin Cabral Mary Corley Carolyn del Vecchio Christine Fisher Karla Fossett Carole Ann Guay Molly Hawkinson Kyle Melton Bethany Pike Jordan Ramsey Jon Williams	839
	ELC ED/EDE Reporting <i>Service Approach</i> 2.1 Analyze Local Health Department (LHD) SurveyMonkey reporting responses weekly	Nicole Becnel Charlie Leadbetter Julie Sullivan April Adames Arwa Alniemi	488

Ref #	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	<p>2.2 Analyze and develop reports on LHD responses monthly</p> <p>2.3 Support the Office of Epidemiology and Prevention Services (OEPS) to improve reporting processes and response rates</p> <p><i>Deliverable</i></p> <p>D05 Monthly LHD Response Reports</p> <p><i>Completion Criteria</i></p> <p>ELC ED/EDE Reporting will be considered complete following the D10 Project Closeout Meeting.</p>	<p>Julie Cox-Kain Erica Hoffman Becki Moore Andrew Oliver Melissa Payne Makah Sesay Luci Veilleux Caitlin Cabral Mary Corley Carolyn del Vecchio Christine Fisher Karla Fossett Carole Ann Guay Molly Hawkinson Kyle Melton Bethany Pike Jordan Ramsey Jon Williams</p>	
3.0	<p>ELC Data Modernization</p> <p><i>Service Approach</i></p> <p>3.1 Support the Public Health Data Governance Steering Committee through agenda-setting meetings with the co-chairs, meeting facilitation as needed, and meeting notes</p> <p>3.2 Support the Public Health Data Stewards Council through agenda-setting meetings with the co-chairs, meeting facilitation as needed, and meeting notes</p> <p>3.3 Create Data Modernization Strategic Plan Deliverable Expectations Document (DED), review and finalize</p> <p>3.4 Develop Data Modernization Strategic Plan, review and finalize</p> <p>3.5 Develop Data Modernization Workforce Development Plan, review and finalize</p> <p>3.6 Support grant-required accelerator project to assess data lake to enhance bidirectional data exchange with LHDs</p> <p><i>Deliverables</i></p> <p>D06 Project Meeting Agendas and Notes</p> <p>D07 Data Modernization Strategic Plan</p>	<p>Nicole Becnel Charlie Leadbetter Julie Sullivan April Adames Arwa Alniemi Julie Cox-Kain Erica Hoffman Becki Moore Andrew Oliver Melissa Payne Makah Sesay Luci Veilleux Caitlin Cabral Mary Corley Carolyn del Vecchio Christine Fisher Karla Fossett Carole Ann Guay Molly Hawkinson Kyle Melton Bethany Pike Jordan Ramsey Jon Williams</p>	1440

Ref #	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	<p>D08 Data Modernization Workforce Development Plan</p> <p>D09 Action Item, Risk and Issue, and Decision Logs</p> <p><i>Completion Criteria</i></p> <p>ELC Data Modernization will be deemed complete following the D10 Project Closeout Meeting.</p>		
4.0	<p>Project Closeout</p> <p><i>Service Approach</i></p> <p>4.1 Close out project documentation</p> <p>4.2 Conduct a lessons learned session to identify areas of improvement for the BerryDunn team and the BPH team</p> <p>4.3 Hold a Project Closeout meeting to help ensure the final transfer of knowledge and data to BPH</p> <p><i>Deliverables</i></p> <p>D10 Project Closeout Meeting Presentation</p>	<p>Nicole Becnel</p> <p>Charlie Leadbetter</p> <p>Julie Sullivan</p> <p>April Adames</p> <p>Arwa Alniemi</p> <p>Julie Cox-Kain</p> <p>Erica Hoffman</p> <p>Becki Moore</p> <p>Andrew Oliver</p> <p>Melissa Payne</p> <p>Makah Sesay</p> <p>Luci Veilleux</p> <p>Caitlin Cabral</p> <p>Mary Corley</p> <p>Carolyn del Vecchio</p> <p>Christine Fisher</p> <p>Karla Fossett</p> <p>Carole Ann Guay</p> <p>Molly Hawkinson</p> <p>Kyle Melton</p> <p>Bethany Pike</p> <p>Jordan Ramsey</p> <p>Jon Williams</p>	45
		Total	2,812

3.0 Project Resources and Hours

The following table includes additional staffing details and total hours by resource, based on the hourly rates and staffing classifications listed for Year 1 on the Commodity Line (CL) for the current contract. The following roles and rates were used to compute the estimated costs:

- EM = Engagement Manager (\$270/hour)
- LPM = Lead Project Manager (\$215/hour)
- GPM = General Project Manager (\$175/hour)
- SS = Support Staff (\$80/hour)

Table 2: Total Estimated Hours and Costs

CL Year 1	Role	Project Resources	Rate	Est Hours	Est Cost
2	EM	Nicole Becnel	\$ 270.00	8.00	\$ 2,160.00
1	LPM	Charlie Leadbetter	\$ 215.00	65.00	\$ 13,975.00
4	GPM	Julie Sullivan	\$ 175.00	170.00	\$ 29,750.00
4	GPM	Julie Cox-Kain	\$ 175.00	483.00	\$ 84,525.00
4	GPM	Becki Moore	\$ 175.00	110.00	\$ 19,250.00
4	GPM	April Adames	\$ 175.00	773.00	\$ 135,275.00
5	SS	Arwa Alniemi	\$ 80.00	204.00	\$ 16,320.00
5	SS	Erica Hoffman	\$ 80.00	162.00	\$ 12,960.00
5	SS	Andrew Oliver	\$ 80.00	438.00	\$ 35,040.00
5	SS	Melissa Payne	\$ 80.00	162.00	\$ 12,960.00
5	SS	Luci Veilleux	\$ 80.00	204.00	\$ 16,320.00
5	SS	Caitlin Cabral	\$ 80.00	3.00	\$ 240.00
5	SS	Mary Corley	\$ 80.00	3.00	\$ 240.00

CL Year 1	Role	Project Resources	Rate	Est Hours	Est Cost
5	SS	Carolyn del Vecchio	\$ 80.00	3.00	\$ 240.00
5	SS	Christine Fisher	\$ 80.00	3.00	\$ 240.00
5	SS	Karla Fossett	\$ 80.00	3.00	\$ 240.00
5	SS	Carole Ann Guay	\$ 80.00	3.00	\$ 240.00
5	SS	Molly Hawkinson	\$ 80.00	3.00	\$ 240.00
5	SS	Kyle Melton	\$ 80.00	3.00	\$ 240.00
5	SS	Bethany Pike	\$ 80.00	3.00	\$ 240.00
5	SS	Jordan Ramsey	\$ 80.00	3.00	\$ 240.00
5	SS	Jon Williams	\$ 80.00	3.00	\$ 240.00
Total				2,812.00	\$ 381,175.00

Table 4 shows the total estimated hours per month, broken down by project role.

Table 3: Total Estimated Hours per Month

Month	EM Hours	LPM Hours	GPM Hours	SS Hours	Est Hours Per Month
1	1	5	103	80	189.0
2	0.5	5	103	80	188.5
3	0.5	4	103	81	188.5
4	0.5	4	103	80	187.5
5	0.5	5	102	80	187.5
6	0.5	4	102	80	186.5
7	0.5	4	102	80	186.5
8	0.5	5	102	81	188.5

Month	EM Hours	LPM Hours	GPM Hours	SS Hours	Est Hours Per Month
9	0.5	4	103	80	187.5
10	0.5	5	102	80	187.5
11	0.5	5	102	80	187.5
12	0.5	5	103	81	189.5
13	0.5	4	102	80	186.5
14	0.5	4	102	80	186.5
15	0.5	2	102	80	184.5
Total	8.00	65.00	1536.00	1203.00	2812.00

4.0 High-Level Timeline

The following table outlines the work by task for the duration of the project.

Table 4: High-Level Timeline

Task/Month	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
1.0 Engagement Oversight															
2.0 ELC ED/EDE Reporting															
3.0 ELC Data Modernization															
4.0 Project Closeout															

5.0 Signatures

BerryDunn Authorized Signature

As a principal on BerryDunn's Consulting Team and Contract Manager for the West Virginia Engagement, I have reviewed this SOW and am legally authorized to commit BerryDunn to the work as described herein. The work and level of effort estimate is a not-to-exceed cost. Work to be invoiced to BPH will be for actual hours expended, which may or may not equal the projected level of effort, but not exceed the projected level of effort.

Nicole Y. Becnel 2022.04.20
09:56:27 -04'00'

Signature

Date

BPH Approval of Approach, Staffing, and Not-to-Exceed Cost

Kathy Cummins

Signature

4/22/22

Date

Ok

Althea Greenhouse

6.0 Resumes

Nicole Becnel, PMP®

Proposed Project Role:	Engagement Manager
Role at BerryDunn:	Principal with BerryDunn since 06/2010
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	BA, Speech and Hearing Science, University of South Florida Certified Project Management Professional Executive Coaching Certification®

Overview

Nicole brings valuable expertise in her field as an experienced Medicaid IT professional with over 20 years of experience in Health and Human Services project management experience. Her experience includes strategic planning, portfolio, program and project management, business analysis, system design, development, and testing for large health information enterprise systems. She is currently working with the State of West Virginia overseeing the State's Medicaid Enterprise and leverage and reuse initiatives.

Relevant Experience

BerryDunn (06/2010 to present). Nicole works with BerryDunn's Medicaid Government consulting group, and has experience with the following projects:

- **West Virginia Department of Health and Human Resources (DHHR) Bureau for Medical Services (BMS).**
 - *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (07/2020 to present)*
Nicole is the Lead Project Manager for the EDQ Assistance Project to support initiatives to optimize MCO encounter data processes for BMS's risk-based managed care programs. Nicole leads the project team that is assisting the State with the retirement of a historical file submission process between the MCOs and the Data Warehouse/Decision Support Solution (DW/DSS) vendor and implementing a fully compliant 837 encounter data process with the State's fiscal agent and Medicaid Management Information System (MMIS) vendor. BerryDunn provides ongoing project management support; diagnoses and assesses necessary modifications to the MMIS as it relates to encounter data; supports the development, deployment, and implementation of applicable MMIS edits and enhancements to support compliance encounter data processes; and supports, monitors, and troubleshoots MCO testing and deployment of 837 files.

- *Electronic Visit Verification (EVV) Solution Implementation Project (03/2018 to present).*
Nicole leads the project team implementing the overall EVV solution, which includes strategic planning, organizational change management, requirement development, RFP draft narratives and supporting documentation, certification planning and assistance, APD development and updates, evaluation and scoring support/facilitation, vendor onboarding, vendor deliverable review, and UAT planning and support.
- *Integrated Eligibility Solution (IES)/People's Access to Help (PATH) Procurement Support and DDI Project Management (10/2015 to present).*
Nicole is the Lead Project Manager for West Virginia's largest information technology transformation project, the Medicaid enterprise IES, known as People's Access To Help (PATH). PATH supports the eligibility, enrollment, and administration of the DHHR's human services programs, including Medicaid, Children's Health Insurance Program (CHIP), Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. Nicole provides executive leadership working with the internal team, the State, and all vendors. She reviews, coordinates, and oversees statements of work (SOWs), deliverables, and risk and issue management.
- *APD Assistance (07/2010 to present)*
Nicole is the Lead Project Manager overseeing the development and approval of Advance Planning Documents (APDs) to help the State obtain federal funding for Medicaid Enterprise System modernization initiatives such as the Medicaid performance management and quality assurance, third-party liability (TPL) planning, adding CHIP data to the Medicaid data warehouse, Payment Error Rate Measurement (PERM), and the PATH implementation. Nicole's guidance within the APD process has helped West Virginia secure and maintain millions of dollars in federal funding.
- *COVID-19 Contact Tracing and Testing Initiative (04/2020 to 09/2020).*
Nicole led the team that assisted the State with the response to the COVID-19 public health emergency. She supported the DHHR Commissioners and the Secretary to help ensure the State had the support they needed to address COVID-19 and the response to its aftermath. She oversaw the procurement and implementation of a contact-tracing and disease investigation software system, the procurement of federal funding for epidemiological activities and testing, and staffing and organizational development activities for DHHR and BPH. The software helped the State coordinate its contact tracing initiatives and use of the contact tracing platform across a workforce of DHHR volunteers, the National Guard, West Virginia University staff, and State local health departments. The outcome of the project was the successful statewide launch of the new contact-tracing and disease investigation software and the procurement of \$37 million in

federal relief funding for public health initiatives related to COVID-19.

- *Mountain Health Promise (MHP) Implementation Project Management Support (03/2020 to 06/2020)*

Nicole was the Lead Project Manager overseeing the team, assisting the State help ensure a successful implementation and smooth operational transition of the MHP program. The program was administered by a specialized MCO serving children in the child welfare populations, including foster care (FC), adoption assistance (AA), as well as those enrolled in the Children with Serious Emotional Disorder (CSED) 1915(c) waiver.

- *West Virginia Children's Health Insurance Program (WVCHIP) Operational Readiness Review (12/2019 to 10/2020)*

Nicole was the Lead Project Manager overseeing the State's transition of the WVCHIP program from fee for service to managed care to provide seamless care between the two programs and offer greater efficiency and innovation opportunities. The team performed desktop audits of policies and procedures and on-site systems demonstrations of three MCOs selected to provide services to WVCHIP members. The team developed a framework and approach to performing the review; developed a comprehensive readiness assessment tool; facilitated ORR entrance conferences with the MCOs; and performed an evaluation of more than 1,000 MCO policies and procedures to complete the desk-level assessment for the WVCHIP transition to managed care. The team developed unique and tailored findings reports for each MCO and will prepare an Ongoing Performance Monitoring Transition Plan and facilitate a Virtual MCO Systems Review to assist WVCHIP in assessing MCO readiness.

- *Mountain Health Trust (MHT) MCO Procurement Assistance Phase I and Phase II Projects (07/2019 to 09/2020)*

Nicole was the Lead Project Manager overseeing BerryDunn's procurement assistance and project management support for managed care and readiness review services for the MHT program, the State's risk-based managed care program. The team assisted in population expansion under the current comprehensive MCO contract to add the Children's Health Insurance Program (CHIP) to the program. BerryDunn assisted the State with developing a Request for Proposal (RFP) to procure vendors to administer Medicaid and CHIP services on behalf of the State through the MHT. The competitive re-procurement of the MHT program was valued at over \$5 billion and promoted the increased quality of care, health outcomes, and data quality and efficiency for the State's managed care populations.

- *Provider Management Support (7/2019 to 1/2021)*

Nicole served as the Lead Project Manager assisting West Virginia with their leverage and reuse initiatives demonstrating the Leverage Condition established by CMS in the MTA Seven Standards and Conditions. The team also supported West Virginia Medicaid leadership to execute a multi-state collaborative where

states can collaborate, share information, and brainstorm solutions. Nicole led the project team that has supported West Virginia with this initiative. Since its inception, West Virginia has increased membership to 12 state partners that participate monthly.

- *Substance Use Disorder (SUD) Waiver Initiative Project (07/2016 to 6/2017).*
Nicole was the Lead MMIS Project Manager overseeing the SUD waiver initiative "Creating a Continuum of Care for Medicaid Enrollees with Substance Use Disorders" Section 1115 waiver demonstration. The waiver allows the State to strengthen its SUD delivery system to improve the care and health outcomes for State beneficiaries with SUD through expanded SUD service coverage and new programs to improve the quality of care. The team provides annual and quarterly reporting to CMS and financial reporting requirements for budget-neutrality, future technology procurements to support the five-year demonstration, and MCO contract requirements specific to the SUD demonstration.
- *Medicaid Information Technology Architecture (MITA) 3.0 State Self-Assessment (SS-A) Maintenance and Annual Update Assistance Project (8/2015 to 01/2020)*
Nicole was the Lead Project Manager for BMS's MITA SS-A efforts, including the annual maintenance of SS-A activities and Data Management Strategy (DMS). She leads the organization development planning to support WV's MITA maturity and modernization efforts. The team is creating a roadmap and schedule to help the State assess areas for improvement and change specific to departmental and bureau(s) structure, operational improvements, talent development, and training. Organization development for the project will take the MITA SSA findings and focus on the DHHR goals and objectives for its MMIS, the technical architecture assessment of the State's Medicaid modules' maturity levels, and business area assessments of the State's Medicaid system modules. These activities clarify BMS's short-term and long-term strategic goals and help BMS request enhanced federal funding to achieve those goals.
- *Project Management of MMIS Procurement, DDI, and Certification (12/2012 to 09/2013).*
Nicole served as a project manager for the DDI of the Molina HealthPAS MMIS. Her work on the project included oversight of contract start up activities and system design sessions. She was responsible for managing the project team and providing oversight of the start-up and analysis/design activities.
- *Provider Enrollment (PEA) Project (07/2011 to 12/2012).*
Nicole supported the Bureau with her project, program and portfolio management and subject matter expertise as they implemented health care reform. This work included implementation of provider enrollment screening requirements for various provider classifications to reduce potential fraud and abuse. Nicole also assisted with provider outreach activities including presentations and training at Provider Workshops held throughout the state.
- *5010 Refresh Project (10/2011 to 08/2013).*

Nicole served as project manager for the successful implementation of the 5010/D.0 standards required by federal mandate. In this role, Nicole supported the Bureau with her project management and subject matter expertise during the conversion of HIPAA Accredited Standards Committee (ASC) X12 version 4010A1 to ASC X12 version 5010 and National Council for Prescription Drug Programs (NCPDP) version 5.1 to NCPDP version D.0. This work included project management of deliverable review, SME advisory services, UAT plan assistance, operational readiness assessment, and post implementation project management and monitoring.

- *Data Warehouse / Decision Support System (DW/DSS) Project Management (06/2010 to 06/2011).*

Nicole served as the project manager to assist the State with the development of procurement documentation for the DW/DSS re-procurement. In this role, Nicole was responsible for managing the project team, serving as liaison with the Bureau, reviewing project deliverables, and providing subject matter knowledge and support.

- Additionally, Nicole has served in the role of project manager, lead MMIS manager or lead project manager under the current West Virginia contract and past contracts for the following projects:
 - *Managed Care Organization (MCO) Operational Readiness Review (ORR) Assistance (09/2020 to 12/2020)*
 - *Medicaid Management Information System (MMIS) Fee Schedule and Edit Quality Review Project: Phase III (06/2020 to 11/2020)*
 - *Mountain Health Trust (MHT) Managed Care Organization (MCO) Procurement Assistance Project: Phase II (05/2020 to 09/2020)*
 - *Substance Use Disorder (SUD) Waiver Initiative Phase 4 (04/2020 to 05/2021)*
 - *Mountain Health Promise (MHP) Implementation (Coordinated Care Management) (03/2020 to 06/2020)*
 - *Managed Care Organization Transition: Phase II (03/2020 to 02/2021)*
 - *State Plan Review and Support (SPRS) (02/2020 to 05/2021)*
 - *Technical Assistance and Program Support (TAPS): Phase 2 (11/2019 to 04/2021)*
 - *Children with Serious Emotional Disorder Waiver (CSEDW) Initiative: Phase II (10/2019 to 05/2020)*
 - *West Virginia Children's Health Insurance Program (WVCHIP) MCO Transition Planning (01/2019 to 07/2019)*
 - *Substance Use Disorder (SUD) Waiver Initiative: Phase III (03/2019 to 03/2020)*
 - *Medicaid Management Information System (MMIS) Payment Error Rate Measurement (PERM) Phase II (05/2020 to 05/2021)*
 - *Coordinated Care Management Transition Project Management and Procurement Assistance (02/2019 to 01/2020)*

- *Medicaid Management Information System (MMIS) Fee Schedule and Edit Quality Review Phase II (01/2019 to 04/2020)*
- *Enterprise Program Management Office (EPMO) (11/2018 to 10/2020)*
- *Technical Assistance and Program Support (TAPS) (11/2018 to 10/2019)*
- *Electronic Visit Verification Solution Implementation (06/2018 to 12/2019)*
- *Provider Enrollment (PEA) Year 2 (05/2018 to 05/2019)*
- *Contract Edit Fee Schedule Review (09/2017 to 09/2018)*
- *Innovation Accelerator Program (IAP) Data Analytic Technical Support (09/2017 to 08/2018)*
- *Medicaid Information Technology Architecture (MITA) State Self-Assessment (SS-A) Maintenance and Annual Update Assistance (09/2017 to 08/2018)*
- *Data Visioning and Warehouse Request for Proposal (RFP) Development and Procurement Assistance (09/2017 to 08/2019)*
- *Technical and Information Enterprise Project Management Services (TEPMS) (05/2017 to 07/2018)*
- *Access to Care Project Monitoring Phase (03/2017 to 04/2021)*
- *Provider Re-enrollment (PEA) (03/2017 to 02/2018)*
- *R-MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 07/2017)*
- *Gap Analysis and Project Management Services (GAPMS) (10/2016 to 06/2018)*
- *Income Maintenance Manual (IMM) Update (09/2016 to 09/2017)*
- *Access to Care Project (Access Monitoring Plan Phase) (04/2016 to 10/2016)*
- *Updates to West Virginia Health Information Technology (HIT) Plans and HIT and Health Information Exchange (HIE) Advance Planning Document (APD) Assistance (03/2016 to 04/2017)*
- *RAPIDS Transition Facilitation (02/2016 to 05/2016)*
- *Medicaid Eligibility and Enrollment Request for Proposal (RFP) Development and Procurement Assistance (10/2015-12/2017)*
- *ICD-10 Readiness Assessment, Implementation and Migration (09/2013 to 03/2016)*
- *Medicaid Information Technology Architecture (MITA) State Self-Assessment (SS-A) Maintenance and Annual Update Assistance (08/2015 to 08/2017)*
- *MMIS Design, Development, and Implementation (DDI) and Certification (07/2015 to 12/2016)*
- *Medicaid Eligibility and Enrollment APD (06/2015 to 09/2015)*
- *PPACA Workgroup Oversight (2012 to 2015)*
- *5010 System Refresh (2012 to 2015)*
- *HIT Statewide Strategic Plan development (2012 to 2014)*
- *Provider Enrollment (2012 to 2015)*
- *MITA 3.0 Organizational Redesign (2013)*
- *Policy Workflow Assessment (2013)*
- **New Jersey Division of Medical Assistance and Health Services – MMIS**

Implementation and Certification Leverage and Reuse Project (01/2017 to 01/2018).

As Engagement Manager, Nicole oversaw the BerryDunn team working in collaboration with the New Jersey Implementation Team Organization (ITO) for the Replacement MMIS (R-MMIS). In her role, she was responsible for the oversight of the Leverage and Reuse, Testing and Certification project activities.

Unisys MMIS Operations (now Molina) (09/2001 to 06/2010).

- **Project Manager for MIHMS Provider Enrollment.** Nicole served as Project Manager and SME for the Maine DHHS provider re-enrollment and maintenance implementation project, which created an online tool for enrollment, re-enrollment, and maintenance for Maine's provider community consisting of approximately 8,000 providers. Nicole managed large and complex configuration projects and provided expertise to other implementation initiatives, including conversion, reporting, and interface development.
- **West Virginia MMIS.** Nicole managed the development, implementation, and evaluation of quality management and risk management activities to ensure project compliance with all budget, time and quality specifications to assure client requirements across the Medicaid Enterprise. In her role, Nicole successfully project managed the on-time delivery of the NPI initiative in an accelerated time frame, successfully provided on-site support to BMS during the CMS certification evaluation; facilitated best practice cross communication; and, met customer expectations by monitoring, evaluating and assigning corrective actions.
- **Contract Configuration and Reports Lead for West Virginia MMIS.** Nicole developed, implemented, and documented processes and standards to ensure successful completion of reports. Additionally, she analyzed business processes to transition the configuration to meet the current application. Working with the client, Nicole identified required changes and ensured issues were identified, tracked, reported and resolved in a timely manner. She was also responsible for creating a MITA Report Card and Trending Analysis Report tracking deliverables and report progress.
- **Project Management Support.** Nicole served in a project management support services role for State Medicaid initiatives including the Kentucky MMIS DDI project, which included schedule management, action item management, training support, provider development, and UAT planning. She also ensured the appropriate project organization processes were closely followed.

Presentations

"Modularity GPS: Defining the Roadmap and Understanding the Landscape," Presentation for MESC 2016, Co-presented with Lisa Alger (CSG Government Solutions) and Andrea Danes (CSG Government Solutions), 8/16/2016

"Managing in a Modular MMIS Implementation," Presentation for MESC 2014, 8/21/2014

Charles K. Leadbetter, PMP®, Prosci® CCP

Proposed Project Role:	Lead Project Manager
Role at BerryDunn:	Principal with BerryDunn since 1993
Years of Experience Relevant to Proposed Role:	28 years
Certifications and Education:	BS, Computer Science and Economics, University of Maine Orono Certified Project Management Professional® Prosci® Certified Change Practitioner

Overview

Charlie is a principal and leads BerryDunn's State Government Consulting Group. He has provided executive leadership for state agencies across the country for over 25 years. He offers this project best practices in project oversight, project health assessments, QA, IV&V, project management, and engagement oversight. He has experience managing large state, high stakes projects, and utilizes project management best practices during all of his engagements.

Relevant Experience

BerryDunn (1993 to present). Charlie is the leader of BerryDunn's State Government consulting team.

- **Maine Office of Information Technology (OIT) and Office of Child and Family Services (OCFS) – Point-In-Time Independent Verification and Validation (IV&V) for Comprehensive Child Welfare Information System (CCWIS) (08/2020 to present).**
Charlie is the project principal on BerryDunn's IV&V team. The team is monitoring and assessing the CCWIS implementation project on a quarterly basis during the 18-month implementation, as well as for a period of six months after implementation.
- **Puerto Rico Department of Health (PRDoH) – Health Information Technology (HIT)/Health Information Exchange (HIE) Support Services (04/2020 to present).**
Charlie is serving as principal on this project to assist PRDoH with planning and implementation of an HIE. Services provided BerryDunn team include performing an HIT assessment and developing recommendations and an HIT roadmap to help ensure successful establishment of the HIE. In addition, BerryDunn is providing project management services for HIE planning and implementation activities, and other support such as development of the HIT IAPD and updates to Medicaid Information Technology Architecture (MITA) State Self-Assessment (SSA) documentation.
- **Arizona Department of Economic Security (ADES) – AALMPP Feasibility Study (04/2020 to 02/2021).**

Charlie is leading a team that is assisting the ADES in planning for the replacement of three legacy mainframe systems. This project involves performing a requirements analysis, alternatives analysis, and a cost benefit analysis to develop a comprehensive Implementation Advanced Planning Document (IAPD) and a DDI Statement of Work to procure replacement systems.

- **West Virginia Bureau for Public Health (BPH)**
 - *Enhancing Laboratory Capacity-Enhancing Detection (ELC-ED) Project Management (10/2020 to present)*
 - *Children with Special Health Care Needs Business Process Redesign and Procedure Manual Completion (03/2020 to present)*
 - *Electronic Vital Records System Implementation (02/2020 to present)*
 - *Emergency Medical Services Data System Procurement Support (11/2019 to 10/2020)*
 - *Strategic Map Implementation Support and Performance Management/Quality Improvement Planning (10/2019 to present)*
 - *HIV and Hepatitis Work Flow/Business Process Analysis and System Configuration (09/2019 to 06/2020)*
 - *Public Health Accreditation Preparation Project (10/2018 to 09/2019)*
- **Indiana State Department of Health Maternal and Child Health (MCH) – Data System Assessment (08/2019 to 09/2020).**
 Charlie is project principal for this project to assess the current MCH data systems and end user applications, identify gaps and make recommendations, and develop requirements to enable the MCH Division to procure services and solutions needed to meet future data systems' needs. These needs include, but are not limited to health information exchange (HIE) systems interoperability; robust Extract, Transform, and Load (ETL) processes; provider access and information sharing, and data management as it relates to Title V block grant MCH national performance measures and State of Indiana-specific initiatives.
- **West Virginia Department of Health and Human Resources (DHHR) – Child Welfare Initiatives Project Management Services (10/2018 to present).**
 Charlie is serving as the project principal providing project management services to the West Virginia DHHR, working to strengthen the execution of priority BCF initiatives by helping to ensure that programmatic and policy changes are being managed to support the State project teams and the people making funding, prioritization, resourcing, and technical decisions.
- **West Virginia Bureau for Medical Services (BMS) – COVID-19 Contact Tracing and Testing Initiative (04/2020 to 08/2020)**

- **Arizona Department of Economic Security/Division of Developmental Disabilities (ADES/DDD) - Focus HIPAA TCS Compliance Project (04/2019 to 10/2019).**
Charlie was the project principal for this engagement to perform an assessment and gap analysis of DDD's compliance and alignment with HIPAA- and CMS- transactions and claim processing code sets and to develop alternatives and an IT roadmap to close gaps and achieve the desired future state.
- **Washington Health Benefit Exchange (WAHBE) – O&M System Integrator Re-Procurement Planning (05/2018 to 05/2019).**
Charlie provided leadership and oversight to this engagement to assess, define requirements, and develop an RFP for the re-procurement of an O&M system integrator for the WAHBE.
- **Vermont Department of Health Laboratory – Project Management and Technical Support for STARLIMS Implementation (02/2017 to 06/2018).**
Charlie was project principal leading our team that provided project management oversight for the implementation of the department's laboratory information system.
- **South Carolina Department of Health and Environmental Control (DHEC) – EHR System Planning and Procurement Assistance (09/2016 to 05/2018).**
Charlie served as project principal for this project with DHEC to plan for selection and implementation of an EHR. Key activities for this project included assessing the current environment, guiding DHEC through its vision for the desired future state, and performing a needs assessment. Additionally, the project team facilitated joint requirements planning sessions, developed system requirements, and developed an RFP for the EHR.
- **Hawai'i Department of Human Services Med-QUEST Division (MQD) – Organizational and Business Process Redesign (07/2017 to 04/2018).**
Charlie provided project leadership for this initiative to review studies, analyze documented operational processes, observe current workflow patterns, conduct interviews with key personnel, and gather information on current barriers to improving efficiency. The project will culminate in process improvement recommendations and strategies to implement proposed changes.
- **Vermont Agency of Human Services (AHS)**
 - **Uniform Reporting Requirements and Specialized Programs Project (02/2015 to 10/2016).**
Charlie was principal for this project, working with AHS and Pacific Health Policy Group to develop uniform reporting requirements and business processes via the HSE to support state and federal reform initiatives.
 - **Health Services Enterprise Lesson Learned Initiative (03/2014 to 04/2014).**
Charlie served as project principal for a "lessons learned" initiative to help the State evaluate the governance, management, and oversight of the initial

implementation of this first release of the Health Services Enterprise solution (Vermont Health Connect and MAGI Medicaid eligibility) including the best approach to organizational realignment to meet their goals.

- *Medicaid Enterprise Solution Risk Assessment, Cost Benefit Analysis, and Implementation Advance Planning Document (IAPD) Development (02/2011 to 04/2011).*

Charlie oversaw a risk assessment for Vermont's Medicaid Enterprise System replacement project, as the State considered alternatives for replacing its outdated Medicaid Management Information System (MMIS).

- **West Virginia Bureau for Children and Families (BCF) – Project Management for Enterprise Content Management Project (08/2015 to 08/2016).**

As project principal, Charlie is providing oversight to the BerryDunn team's collaboration with BCF to develop as-is business processes that depict how the BCF conducts major processes today and identify where bottlenecks, challenges, and redundancies exist.

- **Vermont Green Mountain Care Board (GMCB) – Vermont Health Care Uniform Reporting and Evaluation System (VHCURES) Independent Review, Procurement Assistance, and Project Management (01/2014 to 05/2015).**

Charlie served as project principal for an initiative to support the GMCB with project management services to support the planned improvements in data processing, security, and usability of the VHCURES data resource. This support included the review and refinement of the existing business case, oversight of business requirements development, and identification of optimal collaboration points between the selected implementation vendors, among other project management tasks.

- **Massachusetts Executive Office of Health and Human Services (EOHHS)**

- *Next Generation Systems Planning Project and MITA SS-A (05/2011 to 02/2015).*

Charlie served as project manager for Massachusetts' Next Generation Systems Planning Project. The initial effort was to complete a MITA SS-A for the Departments of Developmental Services (DDS), Mental Health (DMH), and Public Health (DPH). The CMS MITA SS-A framework was leveraged to enable the agencies to define the current state of their major business processes and technical environment to determine which areas should be matured in order to meet their business needs and vision. Our team listed and prioritized the State's goals, documenting the core business processes by agency, and completing both the as-is and to-be assessment of business and technical capabilities. We then leveraged the information gained from these activities and assisted the agencies in the development of a Consolidated Requirements Document, which served as the basis for the procurement of the next generation system(s). BerryDunn then supported the development of the RFP and worked with EOHHS to procure the next generation system.

- *State Medicaid Health IT Planning and IAPD Development (10/2010 to 04/2011).*
BerryDunn led the development of Massachusetts' State Medicaid Health IT Plan (SMHP), as required by the American Recovery and Reinvestment Act and Health Information Technology Economic and Clinical Health Act. The SMHP serves as the strategic vision for EOHHS as it moves forward with the development of health information technology (HIT) and information exchange activities and will become a critical component of the overall Commonwealth HIT Plan. Following the development of the SMHP, BerryDunn developed the IAPD, which set forth the Commonwealth's funding request and cost justification to CMS. Charlie served as project director for this engagement, where he was responsible for four core teams of BerryDunn and subcontractor resources, along with subject matter experts and other project resources.
- **Maryland Health Benefit Exchange (HBE) – IV&V for Maryland's HBE Implementation (11/2012 to 04/2014).**
Charlie led BerryDunn's team to provide IV&V for Maryland's HBE implementation, to fulfill the State's health insurance eligibility and enrollment functionality and plan management, presentment, and selection. As principal, Charlie oversaw the quality of services provided by our project management team, our four core team analysts, and our pool of subject matter experts and analysts.
- **New Hampshire Governor's Commission on Medicaid Expansion – Consulting Services for Medicaid Eligibility Expansion Study (07/2013 to 10/2013).**
Charlie led a team that provided consulting services to a bi-partisan Commission established by the New Hampshire governor to study a possible Medicaid expansion for the State. The team's services were focused on process design for the Commission deliberations as well as report development and writing. In addition to leading the Feasibility Study project, Charlie led the writing of the Report of the Commission to Study Expansion of Medicaid Eligibility that the Commission provided to the State legislature.
- **West Virginia Offices of the Insurance Commissioner (OIC) – Health Insurance Exchange (HIX) Planning (06/2011 to 06/2013).**
BerryDunn worked with the OIC on several key activities, most notably leading the development of the State's HIX IT Strategic Plan, which serves as a strategic roadmap for to guide the State in complying with Affordable Care Act (ACA) requirements and timelines. We also led the development of the HBE Business Plan and Financial Sustainability Model; developed an RFI for HBE systems vendors; provided grant-writing support; provided project management for several initiatives; facilitated the Plan Management workgroup; and provided policy analysis in areas such as financial management. Charlie served as principal for this engagement, providing project oversight and high-level management of the project team.
- **Missouri Department of Mental Health (DMH) – Electronic Medical Record System Assessment and Long-Range Information Strategy Plan (03/2013 to 04/2013).**

BerryDunn completed an independent assessment of DMH's current information systems, as well as future information system needs as defined by DMH management and the HITECH Act. Based on the team's evaluation, BerryDunn developed an Information Strategy Plan to identify gaps between the current and long-range business and technical needs and provide a roadmap for DMH to acquire, develop, and/or integrate clinical information systems to optimize efficiency and meet state/federal regulatory requirements.

- **Vermont Department of Children and Families (DCF) – Project Management and Quality Control for Vermont Family and Children Tracking System (VFACTS) Implementation (02/2011 to 06/2012).**
The Vermont DCF engaged BerryDunn to analyze the current processes and business needs for the Child Development Division's Integrated Services Data Management System. As the result of our analysis, DCF determined the need to procure a new system. BerryDunn then assisted with the development of functional requirements and an RFP document. We then provided project advisory services during the implementation of the selected system. Charlie had responsibility for the quality of work provided to the DCF, including the approval of all deliverables.
- **Connecticut Department of Public Health (DPH) – Business Analysis of Licensing and Credentialing System (10/2007 to 04/2008).**
BerryDunn conducted a business needs assessment and workflow analysis of the processes DPH completed for its licensing and credentialing system. For this project, the team documented technical and functional requirements and developed a logical system design document that outlined the necessary business, technical, and system interface requirements and created an entity relationship model. Charlie served as project manager for this engagement. BerryDunn's analysis provided the requirements necessary for DPH to create an RFP to procure a new system.
- **West Virginia Bureau for Medical Services (BMS) – Quality Assurance Oversight of MMIS and Pharmacy POS Implementation (04/2003 to 03/2008).**
BerryDunn worked in partnership with the State's BMS to assess the development and implementation of the MMIS replacement and Pharmacy POS system and help ensure that the systems developed met stated business and technical requirements. Charlie served as part of BerryDunn's project team to provide independent quality assurance services for the State's MMIS implementation.
- **New Hampshire Department of Health and Human Services (DHHS)**
 - *IV&V for Medicaid Decision Support System (DSS) Implementation (01/2003 to 06/2005).*
Charlie served as project manager for BerryDunn's engagement to provide IV&V services for New Hampshire's Medicaid DSS implementation, which involved analyzing issues, risks, and system impacts and providing recommendations to mitigate these potential problems. As project manager, Charlie served as liaison

with the State and vendor project teams, oversaw the services provided by BerryDunn's teams, and led the development of BerryDunn's deliverables.

- *Project Management for Enterprise Data Warehouse Project (09/2001 to 03/2002).*

Charlie facilitated enterprise data warehouse system design discussions and developed business and technical recommendations for 24 user-defined reports for two primary divisions within DHHS. Project tasks included mapping data elements required for each report to the back end system, determining report and data security requirements, developing report layouts and technical specifications, and facilitating stakeholder meetings with 70 end users that achieved both end-user support for the processes and documented business and technical specifications of each identified report. The project also included recommendations for a strategic department-wide reporting environment using warehouse data.

Julie Sullivan, MBA, MPH, PMP®, CCP

Proposed Project Role:	General Project Manager/Program Manager
Role at BerryDunn:	Manager with BerryDunn since 05/2018
Years of Experience Relevant to Proposed Role:	25 years
Certifications and Education:	Master of Public Health (MPH) and MBA, University of Illinois-Chicago BA, History, Northwestern University PMI Certified Project Management Professional (PMP®) Prosci® Certified Change Management Practitioner (CCP)

Overview

Julie leads BerryDunn's Public Health Practice and has 25 years of experience developing and implementing state and local governmental public health program, policy, and process improvements. Her expertise includes project management and strategy development, accreditation preparedness, process analysis and redesign, staffing analysis and planning, and policy development. Julie understands governmental public health from the inside and brings the fresh perspective of a consultant; from her 10 years' experience leading and innovating as the City of Portland, Maine's Public Health Director, 3 years as Senior Advisor to the City Manager, and 10 years of partnership with the State of Maine's Center for Disease Control, Julie knows how to build relationships, identify key decision points, and help governmental public health agencies achieve their project objectives.

Relevant Experience

BerryDunn (05/2018 to present)

West Virginia Bureau for Public Health (BPH)

- *Multi-Grant Project Management Office (05/2021 to present)*
Julie oversees the team providing grants preparation and management, coordination and strategy, and project management for federal funding related to COVID-19 and immunizations, workforce, and health disparities.
- *Emergency Medical Services Data System Implementation Project Management (02/2021 to present)*
Julie directs the team providing vendor oversight and project management for the implementation of a data system capturing the ambulance run data from around the state, and managing the licensing, credentialing, and designation processes for the state.
- *Epidemiology and Laboratory Capacity - Enhancing Detection Project Management*

(01/2021 to present).

Julie leads the team providing project management services for COVID-19-related funding and activities, including staffing analysis and planning, logic model development and implementation, and disease surveillance/case investigation/contact tracing software maximization.

- *Strategic Map Implementation, Phase Two (01/2021 - present).*

Julie manages the team focused on managing the Policy Review Team, Performance Management (PM) and Quality Improvement Council, and implementation of the numerous PM goals, as well as updating the Strategic Map.

- *Women, Infants, and Children (WIC) Crossroads Management Information System (MIS) Product Management Organization (PMO) (11/2020 to present)*

Julie provides oversight for the team serving as the PMO for a four-state collaborative and their system maintenance and enhancement vendor.

- *Children with Special Health Care Needs Business Process Redesign and Procedure Manual Completion (03/2020 to 01/2021).*

Julie oversaw the business process redesign and procedure manual completion for the program to align with national standards, as well as collaborating with multiple state stakeholders to develop requirements for a case management solution procurement.

- *Electronic Vital Records System Implementation (02/2020 to present).*

Julie is currently managing the implementation of a new electronic vital records system for the State to migrate all historical data and move from an out-of-date, paper-based system to a simple web-based platform for internal and external users, including a wide array of stakeholders across the state.

- *Emergency Medical Services Data System Procurement Support (11/2019 to 10/2020).*

Julie led the development of a Request for Quotation and the post-procurement support for a new emergency medical services data system to allow the state and its many partner agencies to more tightly coordinate activities and access key reporting indicators, such as naloxone administration, to gain insight into opiate overdose trends in real time.

- *Strategic Map Implementation Support and Performance Management/Quality Improvement (PM/QI) Planning Project (10/2019 to 12/2020).*

Julie is the Project Manager for four work groups (workforce development, data-driven decision-making, administrative policies and procedures, and stakeholder engagement) as part of implementing the state's Strategic Map vision and is leading a process to develop and implement a Performance Management and Quality Improvement Plan. Julie coordinates with over 40 internal stakeholders to reach goals in each of the four priority focus areas.

- *HIV and Hepatitis Business Process Analysis and System Configuration (09/2019 to*

06/30/2020).

Julie managed mapping HIV and hepatitis processes to redesign the disease investigation approach, moving from a paper-based system to leveraging existing capacity in the National Electronic Disease Surveillance System, which removed more than 30 steps from the original process. Julie and her team also developed training and implementation materials supporting the new HIV and hepatitis workflows.

- *Public Health Accreditation Preparation Project (10/2018 to 09/2019).*

Julie worked with nearly 50 internal stakeholders to conduct a gap analysis for the approximately 350 pieces of documentation required by the Public Health Accreditation Board (PHAB). Julie identified full and partial gaps and provided a readiness score to each PHAB domain as well as a total score. The recommendations to address gaps and move closer to accreditation readiness served to inform the Strategic Map Implementation project.

West Virginia Bureau for Medical Services (BMS)

- *COVID-19 Contact-Tracing and Testing Initiative (04/2020 to 08/2020).*

Julie served as part of team providing project management and coordination services for COVID-19 contact-tracing workforce recruitment and training, and system selection and implementation. This effort resulted in several hundred volunteer contact tracers being identified and trained, as well as expanding statewide capacity for coordinated contact tracing, case investigation, and reporting.

- *1915(c) Children with Serious Emotional Disturbance Waiver Development Project (10/2018 to 11/2019).*

Julie conducted policy research and analysis of other states' 1115 waivers to identify best practices and trends to better meet the needs of this vulnerable population. Julie also wrote many sections of the waiver application. The State was granted this waiver and is successfully implementing these practices.

- *Data Visioning and Warehouse Development and Procurement Assistance Project (07/2018 to 01/2019).*

Julie assisted with facilitation and gathering of RFP specifications, requirements, and test scenario development, and she co-facilitated joint requirements planning sessions.

- *Substance Use Disorder (SUD) Waiver Initiative Project (05/2018 to 11/2018).*

Julie conducted provider network capacity analysis, and supported project reporting and evaluation for this Medicaid 1115 demonstration waiver focused on addressing the SUD epidemic.

City of Portland, Maine (05/2002 to 05/2018)

Senior Advisor to the City Manager (07/2014 to 05/2018)

Julie led initiatives to address priorities for internal and external policy, structural, or financial challenges. She developed and implemented structural and process changes to improve rental housing safety and streamline permitting and inspections functions, which led to an annual revenue increase of over \$500,000. Other projects she led include a task force to evaluate changes to adult emergency shelter system to provide effective supportive services and expand

substance abuse treatment capacity for un- and underinsured clients, with annual savings of \$850,000 in emergency response services alone; an evaluation of the feasibility of and proposed implementation for a new Office of Economic Opportunity focused on immigrant/refugee job linkage with employers, and the Portland Opportunity Crew, linking panhandlers with day labor, job support services, and other case management services; and a request for proposal for a new citywide IT solution to replace the legacy system.

Public Health Director (09/2004 to 07/2014)

Julie managed a \$9.2 million division, doubling revenues during the first few years by expanding grant funding in key areas to meet community needs and redesigning reimbursement processes in clinical settings. She built new data analytics capacity to inform program and policy decisions, beta-tested national accreditation standards and was among first health departments to receive Public Health Accreditation Board status, and innovated program and policy initiatives for multiple federal demonstration grants, including children's exposure to violence, cancer prevention in immigrant/refugee communities, access to healthy local foods, and obesity prevention. Julie managed numerous initiatives with the State of Maine Medicaid Program to address policy and reimbursement challenges arising from the multiple clinical programs run by Portland's health department, including Health Care for the Homeless, Ryan White Positive Health Care, and School-Based Health Centers. Julie also worked with numerous external partners, including the State of Maine's Comprehensive Cancer Control Project, for which she served as an Advisory Board member; co-founded an initiative with the Portland Police Department on children's exposure to violence and changing data collection to better identify cases; and supervised a lead poisoning prevention program. Julie also partnered with the State on a three-pronged strategy to address prescription drug overdoses, including outreach to local providers to maximize the State prescription drug monitoring program, conducting outreach in the community to prevent prescription drug overdose and abuse, and workshops in the streets and at community agencies on the use of naloxone.

Health Promotion Program Manager (05/2002 to 09/2004)

Julie led a \$650,000 program area including substance use disorder prevention and policy, breast and cervical health, cancer prevention, and children's oral health. This included convening a cross-disciplinary, public-private collaborative on co-occurring substance use and mental health disorders that identified duplication and gaps in the system, and developing a new minority health program to connect with preventive health care services, utilizing Medicaid allowances for case managers/health outreach workers.

Chicago Department of Public Health (08/2000 to 05/2002)

As the Safe Start project director, Julie used a \$3.35 million grant from the U.S. Department of Justice to create a five-year strategic plan and 18-month targeted implementation plan for coordinated, expanded system capacity in mental health, courts, healthcare, and child welfare to address the impact of exposure to violence on young children. This included developing a funding and service delivery model for infant mental health services on the south and west sides of Chicago using Medicaid resources, and convening a cross-disciplinary, public-private group

to create Chicago's first child advocacy center, co-locating all relevant forensic, judicial, and supportive services.

KPMG LLP (06/1997 to 08/2000)

As a consultant and then a senior consultant, Julie analyzed and presented strategic options in potential hospital mergers, and designed financial restructuring and internal financial process improvements for a Medicaid HMO and numerous other health and hospital systems around the country. She conducted Medicaid and commercial HEDIS audits for quality and effectiveness-of-care measures, as certified by the National Committee for Quality Assurance, evaluated data collection and claims processing for compliance and efficiency at Medicaid HMOs, and assessed competitive pricing and service mix for a national rehabilitation facility.

Leatrice H. Berman & Associates (08/1995 to 08/1996)

Julie developed patient materials for Medicaid managed care organizations based on national best practices. She analyzed public health measures to assess outcomes of an Illinois family violence reduction project, and evaluated the efficacy of organization-wide benchmarks for patient care quality measurements for Kaiser Permanente in Northern California.

Public Allies (06/1993 to 08/1995)

Julie started the Chicago site, with Michelle Obama, of a federal AmeriCorps demonstration project. She wrote and managed federal, foundation, and corporate funding, recruited 37 municipal and nonprofit partner organizations and program participants, and developed and implemented training curricula and outcome measurement tools.

Education and Certifications

MBA and MPH, University of Illinois at Chicago

BA, History, Northwestern University

Prosci® Certified Change Management Practitioner

PMI Certified Project Management Professional®

Daniel Hanley Center for Health Leadership/Institute for Civic Leadership, Inaugural Class

Maine Public Health Work Group/Statewide Coordinating Council

Julie Cox-Kain, MPA

Proposed Project Role:	General Project Manager/Subject Matter Expert
Role at BerryDunn:	Subject Matter Expert with BerryDunn since 05/2021
Years of Experience Relevant to Proposed Role:	31 years
Certifications and Education:	MPA, University of Oklahoma BA, Public Administration and Communication, University of Oklahoma

Overview

Julie is a seasoned public health leader, with deep expertise at the state and federal levels, bringing over 30 years of dedication to public health administration. Her professional training includes being a Nashville Healthcare Council Fellow, the Management Academy for Public Health, and the National Public Health Leadership Institute. In addition, she has served on the Senior Deputies Committee and the Board of Directors for the Association of State and Territorial Health Officials (ASTHO) and as the Treasurer for the Oklahoma Public Health Association.

Relevant Experience

PHI Consulting Services, LLC (03/2018 to present). Julie is the founder and principal of PHI Consulting Services, a public health improvement consulting firm. Successful projects include educating on factors that impact health and assessment of health system policies and practices compared to evidence-based guidelines. Consulting services include creating inter-sectoral governance structures, strategic planning, community health assessment, community health improvement planning, public health accreditation, performance management, assessment of policies and practices to evidence-based guidelines, group facilitation, project planning, health policy analysis and communicating proven public health policies and strategies to diverse stakeholders.

- **BerryDunn (05/2021 to present).** Julie is currently supporting the following BerryDunn project:
 - **West Virginia Bureau for Public Health (BPH) – Multi-Grant Project Management Office (05/2021 to present)** Julie provides subject matter expertise and strategic direction for the HIV/Hepatitis Elimination Plan Development, Data Modernization, Fiscal Management Improvement, Health Disparities, and Reopening Schools projects. Julie created a new subgrantee funding process to allocate COVID-19 funding, developed a baseline assessment of fiscal management roles, processes, policies, and procedures, created a new data governance structure and strategic plan, assessed the preliminary impact of COVID-19 funding for vaccine equity on disparate populations, and built a reporting approach to collect and analyze school COVID-19 testing data.

Oklahoma State Department of Health (12/1990 to 10/2017).

- **Deputy Secretary of Health and Human Services and Senior Deputy Commissioner (06/2014 to 10/2017):** Julie served as a key health policy advisor on issues pertaining to healthcare reform, multi-payer health initiatives, health workforce, public health, and health information technology interoperability. She developed and managed multi-agency strategic priorities including acting as the state lead on the CMS funded Oklahoma State Innovation Model Design plan, development of a 1332 State Innovation Waiver and National Governor's Association Health Workforce Action Plan, created and served as chairperson to a multi-agency health information technology and data governance body among HHS cabinet agencies.

Concurrently, she served as the Sr. Deputy Commissioner of the OSDH providing leadership and direction to enterprise and strategic priorities of the department including public health informatics and healthcare information; performance management, quality improvement and public health accreditation; health systems innovation and access to care; as well as the prevention of obesity, tobacco use and chronic disease in Oklahoma. During this time, the OSDH implemented multiple IT systems that support bidirectional information exchange with healthcare providers, developed tools for greater data transparency, created collaborative teams enabling comprehensive health workforce planning, leveraged Medicaid for health outcome improvement and improved adult smoking rates by 25% in the last five years. Duties of this role included oversight of the Chief Operating Officer and associated business functions.

- **Chief Operating Officer (10/2009 to 06/2014).** Julie was responsible for the operational management of the Oklahoma State Department of Health, including approximately \$370 million and 2,100 FTE. Specific duties included developing operational and business plans for the achievement of strategic priorities and the improvement of health outcomes, developing accountability systems for monitoring progress toward achieving key performance measures, and managing agency financial resources for optimal performance. During this time, the OSDH became one of the first accredited public health departments in the nation. This position included the direct supervision and management of the agency Information Technology Service, the Office of Communications, Human Resources, Office of Performance Management and the Chief Financial Officer.
- **Deputy Commissioner, Disease and Prevention Services (02/2008 to 10/2009).** Julie provided leadership, oversight and direction to Disease and Prevention Services; fostered external partnerships for the development and advancement of public health policy; collaborated with other agency executives to advise the Commissioner regarding overall leadership, vision and strategic direction; formulated policy, procedures and standards for all programs under administrative direction; represented the agency and the Commissioner at state, regional and national meetings. Disease and Prevention Services included Acute Disease Service, HIV/STD Service, Immunization Service, Injury Prevention Service, Public Health Laboratory, Emergency Preparedness and

Response and Tobacco Use Prevention Services. Disease and Prevention Services had a budget of approximately \$55 million in state, fee and federal funding and 238 FTE.

- **Chief of Operations/Administrative Director, Disease and Prevention Services (01/2002 to 01/2008).** Julie was responsible for the oversight and day to day operation of Disease and Prevention Services. Responsibilities included oversight of the budget, personnel and other resources necessary in the administration of programs; developing and implementing internal policies; advising the Deputy Commissioner on the administration of programs; acting on behalf of the Deputy Commissioner in his absence; administration of federal grant funds and development of the annual budget.
- **Prior Roles (12/1990 to 01/2001).** Julie held various progressive titles and responsibilities including budgeting and accounting duties; creating competitive bids and other contracts; managing and overseeing work completed by non-profit organizations; administrative, financial and grant responsibilities and services as OSDH Procurement Director.

Appointments

Oklahoma State University Center for Health Sciences, College of Osteopathic Medicine, Adjunct Instructor, 2014 to 2018

Gubernatorial Appointment, Governmental Technology Application Review Board, 2012 to 2017

HHS Secretary Appointment, Governor's Council for Workforce and Economic Dev., 2016 to 2017

Gubernatorial Appointment, Oklahoma Health Information Exchange Trust, 2010 to 2012, 2015

Rebecca Moore, MS

Proposed Project Role:	General Project Manager/Subject Matter Expert
Role at BerryDunn:	Senior Consultant with BerryDunn since 05/2021
Years of Experience Relevant to Proposed Role:	24 years
Certifications and Education:	<p>Bachelor's Degree, Eastern New Mexico University</p> <p>Masters of Science, Oklahoma State University</p> <p>Certificate in Public Health Informatics, Johns Hopkins Bloomberg School of Public Health</p> <p>Governor's Executive Development Program for State Officials, 2013</p> <p>American Project Management, Project Management Masters' Certification Program, 2012</p> <p>Oklahoma Public Health Leadership Institute, 2009</p>

Overview

Rebecca is a senior consultant in BerryDunn's Government Consulting Group. Rebecca has over 24 years of experience working in various project manager, data analyst, informatics, and leadership roles with the State of Oklahoma Department of Health and Department of Mental Health and Substance Abuse Services. Rebecca also served as the State Health Information Exchange Director for several years.

Relevant Experience

BerryDunn (06/2021 to present). Rebecca serves as a senior consultant on health and human services-related projects.

West Virginia Bureau of Public Health (BPH) – Epidemiology and Laboratory Capacity Enhancing Detection (ELC-ED) Project (6/2021 to present). Rebecca is serving as the lead for the development of an Enterprise Surveillance System Request for Proposal (RFP). Key activities include performing market research, facilitating vendor demonstrations, facilitating requirements development sessions; and developing IT system requirements, service level agreements, and deliverables and an RFP.

Alaska Department of Health and Social Services (DHSS) – Health Information Exchange (HIE) Planning and Procurement Project (8/2021 to present). Rebecca is serving as the project manager for the BerryDunn team supporting DHSS in procurement of an HIE management and technology solution. Key activities include conducting market research, facilitating discovery sessions, developing a needs assessment and RFP, and supporting the procurement and post-procurement activities.

Oklahoma State Department of Health (10/2020 to 05/2021). As an operations strategy and reporting specialist, Rebecca managed the move of 900 staff to a new building by managing the move schedule and collaborating with movers and the IT Project Manager. She also led the development of the Operations Strategic Plan, and led the identification of processes for improvement and development of automated processes for building management and financial services.

Oklahoma Office of Management and Enterprise Services (03/2020 to 10/2020). Serving as the Director of Data Driven Services, Rebecca led the implementation of COVID health applications including antibody testing scheduler, contact tracing, and case investigation for the Oklahoma State Department of Health while collaborating with Google, Salesforce, and MTX. She also led the implementation of unemployment data reporting tools in collaboration with the Oklahoma Employment Security Commission and Microsoft Services.

Oklahoma State Department of Health (09/2013 to 03/2020). As the Director of Informatics, Rebecca led the development of the new Informatics Division. She established an advisory council, developed division strategic plan and staffing plan to include 13 staff to service the informatics needs of the agency including policy, privacy and security, data governance, and enterprise services management. She also ensured that the informatics division adhered to Public Health Informatics Institute's competencies; served as product owner of multi-agency interoperability solution to support modern, efficient, and effective government; obtained and managed federal funding to support and enhance public health data submissions; served as a liaison between agency and consolidated information technology agency; and served as agency representative on Oklahoma Health and Human Services multi-agency shared services governance committee and Data Governance Sub-committee.

Oklahoma Office of Management and Enterprise Services (10/2014 to 05/2021). Rebecca served as the state Health Information Exchange director. This included serving as lead in establishing statewide health information exchange through the collaboration of state and private organizations and stakeholders. She planned, managed development of, and executed 10-year strategic plan, and was the lead in establishing the Health Information Technology Advisory Board.

University of Central Oklahoma (08/2010 to 07/2016). Rebecca served as an instructor for College Algebra for Science Majors and Introductory Statistics for the Sciences. She was responsible for the development of curriculum, syllabi, and exams; grading; and classroom instruction.

Oklahoma State Department of Health (08/2007 to 09/2013). As the data warehouse and enhancement coordinator, Rebecca managed informatics needs assessment, led the development of state agency enterprise systems, led the search and selection of state agency interoperability system vendor, and supervised geographic information services (GIS) and web-based data query system staff.

Oklahoma State Department of Mental Health and Substance Abuse Services (04/1997 to 08/2007). Rebecca served as the analytics lead on substance abuse treatment outcome study;

mental health and substance abuse needs assessment; and mental health services transformation project. She mined data to uncover insights and identify outcomes to drive policy, worked with SAS and SQL to develop shell scripts for task automation, prepared data examples and report for agency leadership, and managed federal grants and vendor contracts.

Publications and Presentations

Acevedo A, Garnick DW, Lee MT, Horgan CM, Ritter G, Panas L, Davis SD, Leeper T, Moore R, Reynolds M (2012): Racial and Ethnic Differences in Substance Abuse Treatment Initiation and Engagement, *Journal of Ethnicity in Substance Abuse*, 11:1, 1-21.

Pridemore, W.A., Damphousse, K.R., & Moore, R.K. (2007). Interview mode effects on estimates of need for alcohol and drug treatment among welfare recipients: Evidence from a quasi-experiment. *Journal of Experimental Criminology*, 3(4), 323-336.

Garnick, D., Horgan, C., Lee, M., Panas, L., Ritter, G., Davis, S., Leeper, T., Moore, R., Reynolds, M. (2007). Are Washington circle performance measures associated with decreased criminal activity following treatment? *Journal of Substance Abuse Treatment*, 33(4), 341-352.

Pridemore, W.A, Damphousse, K.R., Moore, R.K. (2005). Obtaining sensitive information from a wary population: A comparison of telephone and face-to-face surveys of welfare recipients in the United States. *Social Science & Medicine*, 61,976-984.

TOPPS-II Interstate Cooperative Study Group, (2003). Drug treatment completion and post-discharge employment in the TOPPS-II Interstate Cooperative Study, *Substance Abuse Treatment*, 25.

Pandiani, J.A., Banks, S.M., Bramley, J., Moore, R. (2002) Cross State Comparison of Mortality for Mental Health Service Recipients. *Psychiatric Services*, 53, 8.

Hendryx, M.S., Moore, R., Leeper, T., Reynolds, M., Davis, S. (2001). An Examination of Methods for Risk-Adjustment of Rehospitalization Rates, *Mental Health Services Research*, 3 (1).

April Adames, MPA

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant with BerryDunn since 06/2021
Years of Experience Relevant to Proposed Role:	9 years
Certifications and Education:	MPA, San Diego State University BA, Psychology, Fort Lewis College

Overview

April brings a focused ability to problem solve and manage complex tasks with dedication and efficiency, consistently meeting all project requirements, budgets, and deliverables. She is a talented project leader, with the ability to lead teams from initial project conception through final stages of implementation and testing. Her areas of expertise include program risk analysis, program methodologies, operations management, implementation management, health information systems, data collection systems, and business process development.

Relevant Experience

BerryDunn (06/2021 to present) As a Senior Consultant, April works directly with State Government Public Health agencies to provide services such as grant preparation and management, project management, needs assessments/gap analyses, staffing studies, accreditation preparation, business process analysis/redesign, information technology (IT) systems planning and selection, organizational change management, and implementation oversight.

- **West Virginia (WV) Bureau of Public Health (BPH)**
 - Epidemiology and Laboratory Capacity (ELC) Project Manager (07/2021-Present). April supports overall project activities by tracking progress towards establish goals, leading weekly project check-in meetings with internal staff and participating in weekly project update meetings with WV executive management staff.
 - Announcement of Funding Availability Project Coordination (06/2021-Present). April supports ongoing efforts to implement a new WV BPH grant solicitation process by reviewing policies, drafting funding announcement documents, and providing overall technical assistance during the grant application review, scoring and award processes.

County of San Diego Health and Human Services Agency (2013 to 2019).

- **Behavioral Health Services (2017 to 2019).** As an administrative analyst, April provided overall leadership and oversight of daily contract monitoring activities, administrative support, and program management for Behavioral Health Services. Her

responsibilities included coordinating procurement activities, contracting and invoicing, team and cross-functional management, and technical assistance/support liaison. She also proactively monitored invoice reviews, site visits, monthly/quarterly progress reports with contractors, and assisted with developing corrective action plans and resolve discrepancies in contract performance.

- **Housing and Community Development Services (2014 to 2017).** April provided technical leadership and oversight of daily configuration, operational support, project management, and reporting functions for supportive housing programs. She strategically managed numerous programs through the development of program goals, tracking progress, meeting deadlines, and monitoring overall delivery. She also conducted investigative research and legislative analysis for housing programs. She coordinated and organized collaborative meetings with community partners and interagency, in addition to event planning and program announcements.
- **Chief Administrative Office (2013 to 2014).** As a management fellow, April supported countywide homeless initiatives by performing strategic program expenditure analysis. She led the development of internal reports for the Chief Administrative Office, and coordinated and attended internal strategic planning meetings, initiating efforts for developing relationships with the community. Partnered effectively with senior leadership to drastically improve relations across multiple agencies and departments.

Veterans Village of San Diego (2012 to 2013). April served as a veteran's family case manager, supporting the Veteran Affairs Grant Per Diem program at a local Transitional Living Facility. She assisted and collaborated with clients in the development of case plan goals and objectives in conjunction with program requirements, coordinated efforts with external agencies and community members to properly market client referrals, and properly evaluated client's adherence to program policies, instituting incentives to reach levels and goals within the program.

Alvarado Parkway Institute (2011 to 2012). April assisted clients and clinical staff members as a mental health professional. She proactively assisted clients in attaining daily living needs and monitoring of mentally ill crisis patients for safety in a therapeutic milieu, and supported encouragement of regular and healthy living practices, indicating compliance with medication regimens.

Axis Health System (2009 to 2011).

- **Residential Counselor.** April led the development of treatment plans based on client strengths. She assisted in crisis management and stabilization, boasting of healthy living skills, and instilling proper medication management. She also directed Dialectical Behavior Therapy groups and dual-diagnosis groups.
- **Detoxification Counselor.** April simultaneously partnered with a team of alcohol and drug treatment professionals, providing a variety of services such as: client basic needs assessment, service planning, referrals to outside agencies, client advocacy, service

provision monitoring, and crisis control.

Heather Oesau, PMP®

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant with BerryDunn since March 2022
Years of Experience Relevant to Proposed Role:	9 years
Certifications and Education:	<p>Bachelor of Science in Systems Biology, University of Wisconsin</p> <p>Master of Arts in Science Education, Western Michigan University</p> <p>Doctorate of Business Administration, University of the Southwest (expected 2023)</p> <p>Certified Project Management Professional®</p>

Overview

Heather is a public health and healthcare consultant with experience in leadership, project management, and process mapping. She has demonstrated success in working on implementation, organizational framework design, and budget development. She has worked with state health organizations, public institutions, and private companies.

Experience

New York University Langone Health (January 2021 to March 2022). Heather worked as an Information Services Technology Project Manager on several portfolios including patient experience, workforce experience, identity management, and research. She worked on approval processes, design phases, planning, implementation, and resources. She also contributed to risk management throughout project lifecycle.

Health Care Services Corp. (January 2021 to March 2022). Heather worked as an Executive Leadership Consultant to operationalize the new organizational framework governance structures through the regulatory and non-regulatory procurement processes. She collaborated with teams to integrate both workflow processes and artificially intelligent systems into their new framework and workflows. She created project plans, charts, schedules, and forecasting from gap analyses, system analyses, and financial analyses, and led metrics and reporting teams through the system and AI integration to close gaps in the initial planning and organizational readiness.

Wisconsin Department of Health Services, Office of Health Informatics (December 2020 to January 2021). Heather worked as a Consultant to collaborate with DHS, the National Guard leadership, and counties across Wisconsin to develop a feasible, iterative schedule to rollout vaccines on both weekly and bi-weekly schedules based on a novel supply and demand data

model developed by our team and the University of Wisconsin through retirement of the model. She led cross-departmental teams to map processes, track data chain of custodies, and determine quality assurance points. She collaborated with teams to identify, determine feasibility, analyze causes, and determine best steps forward as data quality issues needed attention. Heather planned, scheduled, led, and reviewed projects and sessions with the Division of Health Services leadership in Wisconsin related to public data releases, development, and data quality. She also worked with developers to meet the requirements set by leadership by deadlines and resolving roadblocks to prevent delays.

WISEdash Local – CESA 12 (April 2016 to December 2020). Heather worked as Program Director to manage the onboarding process from recruitment of districts through technical processes with database administrator and software vendor Hoonuit (formerly Versifit). She developed the annual budget for 20+ district consortium, and worked with fiscal agents to incorporate fiscal year changes to mitigate potential impacts based on three- and five-year projections as well as due to purchases. She developed and maintained communications plan including pre-set emails during onboarding periods, responsive emails, videos, and a user-friendly welcome kit. Heather negotiated contracts for data security, project alignment, and clarity, and met with internal and external leadership teams to ensure complete, clear, and mutually agreed upon contracts.

Other previous roles include:

- **Massachusetts Institute for Technology (May 2018 to August 2018):** Data Analyst
- **Western Upper Health Department (July 2015 to March 2016):** Health Data Researcher
- **Human Services Department & Public Health (August 2013 to September 2016):** Special Project Management & Grant Writing Specialist

Arwa Alniemi, MPH

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant with BerryDunn since 06/2021
Years of Experience Relevant to Proposed Role:	9 years
Certifications and Education:	Master of Public Health, University of Akron BS, Biology, University of Akron BA, Sociology, Minor in Interdisciplinary Anthropology, University of Akron

Overview

Arwa is an experienced project coordinator, bringing skills and expertise in multicultural awareness, crisis interventions, statistical analysis, and social and behavioral research. Arwa is also fluent in Arabic and skilled in both written and oral communication.

Relevant Experience

BerryDunn (June 2021 to present)

West Virginia Bureau for Public Health (BPH) – Multi-Grant Project Management Office (06/2021 to present)

Arwa supports the COVID-19 Health Disparities and ELC grants management projects by analyzing data, drafting project artifacts and deliverables, and developing data visualizations and presentations.

Maine Department of Health and Human Services, Office of Child and Family Services – Child Welfare Information System Independent Verification and Validation (IV&V) (06/2021 to present)

Arwa supports this point-in-time IV&V project by developing assessment protocols, conducting interviews, collecting and analyzing data, and drafting summary reports of findings.

Cleveland Clinic (07/2018 to 12/2020). As a project manager, Arwa conducted an evaluation with statistical analysis of a creative arts therapy program in an acute psychiatric hospital. Arwa also coordinated with the Institutional Review Board (IRB) at Cleveland Clinic, Northeast Ohio Medical University, and The University of Akron.

From July 2018 to July 2020, Arwa also served as a behavioral health technician, collaborating with an interdisciplinary team to provide treatment for patients with acute behavioral health conditions.

Cleveland Clinic Children's Hospital for Rehabilitation (02/2019 to 05/2019). Arwa developed a survey for parents of children with disabilities addressing the parental experiences,

attitudes, concerns, and challenges of caring for children with physical, cognitive, and developmental disabilities

Tri-City Southwest (01/2019 to 04/2019). As a special needs literacy program developer, Arwa designed and budgeted an evidence-based community literacy program serving adults with a range of intellectual disabilities to be implemented by Tri-City Southwest organization in Cuyahoga County.

Northeast Ohio Medical University, AmeriCorps (08/2015 to 07/2017). As a Health Professions Affinity Community (HPAC) Specialist, Arwa led the program in six high schools, serving 240 students in medically underserved and economically disadvantaged areas. This included delivering a service learning curriculum to help students identify health disparities, mentoring students, and writing grants to fund health improvement projects while utilizing existing community resources

Arwa also served as a research assistant, utilizing CITI certification to collect data for research and evaluation of Health Professions Affinity Community programs, and assessing the program's growth which served 2,000 youth and more than 10,000 Ohioans

Roderick R. Jaballas, Co., L.P.A (05/2012 to 08/2015). As a law office assistant, Arwa gathered and arranged evidence and other legal documents for case preparation and attorney review. Arwa also prepared legal documentation with precision and accuracy, and organized materials for attorney and government agency, U.S. Citizenship and Immigration Services (USCIS) and Bureau of Consular Affairs

Erica Hoffman

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Project Coordinator with BerryDunn since 06/2021
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	MS, Sports Studies, West Virginia State University Bachelor's Board of Regents, West Virginia State University CPR Certification

Overview

Erica is a resourceful administrator with 20 years of experience. She is an expert in Microsoft Office, including PowerPoint, Excel, and Word. She is also experienced in schedule management, event planning, and customer service.

Relevant Experience

BerryDunn (06/2021 to present)

West Virginia Bureau for Public Health (BPH)

WIC Crossroads User Group Product Management Office (06/2021 to present)

Erica is providing project coordination support for this four-state group of Women, Infants, and Children (WIC) state agencies collaborating on the same software system by providing meeting notes, drafting meeting agendas, managing scheduling, drafting project artifacts and deliverables, and tracking project action items, risks and issues, and adherence to contractual service-level agreements.

Electronic Vital Records System Implementation Project Management (06/2021 to present)

Erica supports this project by providing meeting notes, drafting meeting agendas, managing scheduling, drafting project artifacts and deliverables, and tracking project action items, risks and issues, and adherence to contractual service-level agreements.

Mountaineer Montessori School (07/2019 to 05/2021). Erica taught Nutrition Science and Physical Education to MMS students, as well as served as the fundraising coordinator. In that role, she not only met goals for the past two years, but also exceeded those goals substantially.

Abundant Life Ministries (02/2010 to 07/2019). As an office administrator, Erica was responsible for making schedules for multiple departments, video editing, bookkeeping and paying of bills, Abundant Life Bible College registrar, and community outreach. She also organized and spearheaded community programs such as food programs, fairs, and community education.

West Virginia Department of Education (01/2001 to 10/2006). As a secretary, Erica organized meetings and conferences, processed travel reimbursements, answered and directed phone calls, answered client queries, created documents to be dispersed to West Virginia schools, superintendents, principals, and teachers.

Andrew Oliver, MS

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant with BerryDunn since 07/2021
Years of Experience Relevant to Proposed Role:	7 years
Certifications and Education:	Master of Science, Public Administration, Central Michigan University Bachelor of Science, Communication, Western Carolina University

Overview

Andrew is an experienced professional with an M.S. in Public Administration and over six years of experience as a project associate in the technology and government industries. He is a proven communicator with the ability to leverage technology and data, and present information in a clear and impactful way. Andrew has strong experience working with organizational leadership, marketing, and developers, both in person and in a remote environment.

Relevant Experience

BerryDunn (07/2021 to present). Andrew is a consultant in the State Practice Area of the Government Consulting Group.

- **West Virginia Department of Health and Human Resources (DHHR)**
 - *BPH WIC Crossroads User Group Product Management Office (07/2021 to present).*
Andrew Supports the WIC Crossroads project with business analysis tasks specific to system reporting functionality.
 - *BPH Electronic Vital Records System Implementation (08/2021 to present).*
Andrew supports the EVRS Implementation project with business analysis tasks. Specifically, Andrew has provided insight into User Acceptance Testing (UAT) planning during the implementation of the EVRS Death Registration module.
 - *BSS Policy Website (09/2021 – 12/2021)*
Andrew supports the BSS Policy Website project with business analysis tasks.

Maine Department of Health and Human Services (2019 to 2021). As data analyst 2, Andrew served as the lead data coordinator for the Office of Child and Family Services (OCFS). In this role Andrew provided leadership and stakeholders with reporting, analysis, and visualization of data – resulting in data driven and informed organizational decisions. Additionally, Andrew produced reports and trend analyses of data using Oracle PL SQL and data visualization programs such as Tableau, Einstein, and Microsoft Excel; played a significant role in the

creation, documentation, and successful launch of the organization's first public facing dashboard; and was active in the implementation, data migration, and testing strategy for the new Comprehensive Child Welfare Information System (CCWIS) that will replace the legacy system, Maine Automated Child Welfare Information System (MACWIS).

athenahealth (2014 to 2018). As senior associate – Andrew served as the Voice of the Customer lead and liaison to the network services, patient and population health services, and social media team. In this role, Andrew evaluated data, surfacing trends to stakeholders to facilitate product improvements. He also established and implemented the population health services Voice of the Customer program at athenahealth, and successfully utilized aggregated data and presentations to influence senior leadership, R&D, and product teams. Additionally, Andrew moderated athenahealth's online community, and took ownership of all client-facing self-help content creation, moderation, and workflows for the company's community forums.

Congressional and State Senate Campaigns. Andrew served as social media and communication assistant for congressional and state senate campaigns. In this role, he established a presence on Facebook and Twitter for the candidate, which included managing, creating, and publishing campaign content. He effectively collaborated with candidates and campaign managers to strategize events and candidate promotion.

Memberships and Professional Affiliations

Board Member and Social Media Lead, United Nations Association of Maine

Melissa Payne

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Senior Paraprofessional with BerryDunn since November 2021
Years of Experience Relevant to Proposed Role:	7
Certifications and Education:	Bachelor of Science in Public Health, West Chester University of Pennsylvania Master of Management in Healthcare Administration, Wilmington University Certified Release of Information Specialist 2017

Overview

Melissa has over five years' experience in processing court orders, subpoenas, and records for both medical and legal record request. She has experience in both legal and healthcare settings with practical knowledge of HIPAA compliance, medical management software, and project management.

Experience

BerryDunn (November 2021 to present). Melissa is a project coordinator supporting BerryDunn's Public Health Practice.

West Virginia Bureau for Public Health (BPH)

- *Multi-Grant Project Management Office (11/2021 to present)*
Melissa supports four subprojects implementing federally-funded initiatives on Data Modernization, Reopening Schools, Health Disparities, and the Internal Fiscal Management Improvement Initiative. She provides meeting notes, drafts meeting agendas, manages scheduling, drafts project artifacts and deliverables, and tracks project action items, risks and issues, and adherence to contractual service-level agreements.
- *Emergency Medical Services Data System Implementation Project Management (11/2021 to present)*
Melissa provides meeting notes, drafts meeting agendas, manages scheduling, drafts project artifacts and deliverables, and tracks project action items, risks and issues, and adherence to contractual service-level agreements.
- *Accreditation Readiness Project (11/2021 to present)*

Melissa provides meeting notes, drafts meeting agendas, manages scheduling, drafts project artifacts and deliverables, and tracks project action items, risks and issues, and adherence to contractual service-level agreements.

Macelree Harvey, Ltd. (October 2020 to present). Melissa worked as a record manager to operate and maintain the records management system, liaise with clients who request specific files, and handle the delivery of records. She conducted orientation and training for new hires regarding electronic document retrieval process and oversaw the storage and organization of document storage facilities. Melissa was responsible for the development and implementation of policies and procedures and for the implementation, monitoring, and compliance of the Firms Records Management Policy.

MRO Corporation (July 2016 to October 2020). Melissa worked as a Release of Information (ROI) Specialist to determine the release of records in accordance with HIPAA guidelines and obtain pertinent patient data from various sources, including electronic, off-site, or physical records that match patient request. She logged medical record requests, pulled and transferred information, and disseminated information to correct department, individual or outside location. Melissa resolved customer concerns and developed 6 years' experience with electronic medical records (EMR).

Medrisk Inc. (April 2015 to June 2016). Melissa worked as a Clinical Advocate Support Professional to formulate and enact Service Center policies, procedures and quality assurance measures. She delegated work assignments to the department, created and provided templates for new hire trainees, and developed and implemented policies and procedures to improve department workflow. Melissa also trained new hires on the training manual and individualized templates. She developed familiarity with MedManager and MedVantage while performing administrative duties, customer service, and while working in accordance with the continued authorization process.

Diabetes Education Center of Pennsylvania Hospital (May 2014 to September 2014). Melissa worked as an Intern and Administrative Assistant to support the center. She built up knowledge in project management by actively participating in meetings and brainstorming sessions. She evaluated nursing notes to confirm accuracy of the described care provided and patient responses, and maintained strict patient privacy and confidential patient information, taking care to meet all HIPAA guidelines and statutes for data security.

Lucienne Veilleux, MPA, MPH

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant with BerryDunn since 06/2021
Years of Experience Relevant to Proposed Role:	2 years
Certifications and Education:	Master of Public Policy and Administration/Master of Public Health, Policy and Management, University of Massachusetts Amherst BS, Health Science, <i>cum laude</i> , Springfield College

Overview

Lucienne is an experienced project coordinator, bringing excellent writing and communication skills, public speaking and presentation skills, and leadership and facilitation skills. She has the ability to synthesize complex information to be easily understood, and is detail oriented in all tasks and projects. She also brings experience facilitating multidisciplinary teams to produce detailed policy analysis as part of her content-driven coursework.

Relevant Experience

BerryDunn (June 2021 to present)

West Virginia Bureau for Public Health (BPH) – Multi-Grant Project Management Office (06/2021 to present)

Luci is part of the BerryDunn team the team delivering grants preparation and strategy, grants management, and project management activities for five, multi-million dollar federal funding streams including vaccinations, health disparities, and public health workforce. She supports this project by developing subgrantee reporting tools, analyzing school and lab testing data, conducting research on state and local public health modernization best practices, and drafting client deliverables.

Count ME In (08/2017 to present). Lucienne provides evaluation assistance, creating descriptive survey reports for the evaluation of programs aiming to increase student attendance, engagement, and academic achievement in Maine schools

UMass Amherst (09/2019 to 05/2021). As an evaluation and research assistant, Lucienne supported evaluation plan activities for a CDC and MDPH partnership project to implement and evaluate suicide prevention policies and initiatives for Latinx men and other at-risk populations in MA.

Additionally, Lucienne has served as a graduate teaching assistant, providing support for course planning and logistics, working directly with students to enhance understanding of course content, provide supervision and direction to team of 10 undergraduate teaching assistants.

Massachusetts Department of Public Health (05/2020 to 08/2020). As a capacity building intern, Lucienne developed a wide-ranging and multi-medium resource guide for youth-serving providers and health and human services organizations in Massachusetts, working within the Office of Sexual Health and Youth Development under the Capacity Building Coordinator.

Massachusetts Department of Public Health (05/2019 to 09/2019). As a health equity intern, Lucienne researched health-related data to identify inequities within the City of Worcester and inform potential interventions and policy solutions. She then presented findings and recommendations to city stakeholders and policy leaders.

Communities that Care Coalition (05/2015 to 09/2016). Lucienne served as a parent guide intern, coordinating the planning, content, and article authorship of the Parent Education Working Group's yearly Parent Education Guide, which serves as a resource for local parents, families, and educators.

MaineHealth (05/2015 to 08/2015). As a community health improvement intern, Lucienne supported data collection and compilation for Partnership for a Healthier America's initiative to improve nutrition in MaineHealth hospitals.

Caitlin Cabral

Proposed Project Role:	Editing and Quality Assurance (EQA) Support Staff
Role at BerryDunn:	Staff Editor with BerryDunn since 09/2021
Years of Experience Relevant to Proposed Role:	3 years
Certifications and Education:	Bachelor of Arts in Psychology, University of Hartford

Overview

Caitlin is part of the BerryDunn Editorial/QA team who has demonstrated experience in project management, administrative oversight, and organizational duties. She is a self-motivated learner with a strong academic history and the ability to master several roles in the workplace.

Experience

BerryDunn (September 2021 to present). As a member of BerryDunn's Editorial/QA team, Caitlin is responsible for proofreading and copyediting meeting notes, memos, and PowerPoint presentations for various government entities. This requires helping to ensure that documents conform to BerryDunn's formatting and writing standards.

QualityMetric (August 2020 to September 2021). Caitlin worked as a project research assistant and acted as project manager on several concurrent projects, with responsibilities including timeline management, client communications, and supervision of vendors. She provided administrative support to project teams by taking meeting minutes, scheduling calls, processing invoices, and quality-checking materials. She also served as the Deliverable Tracking Manager, which entailed maintaining detailed records and proper storage of deliverables for all ongoing projects. Caitlin was also responsible for copyediting proposals and deliverables for spelling, grammar, fluency, and consistency.

University of Hartford's Department of Psychology (January 2019 to May 2020). Caitlin worked as a research assistant to aid in running experimental sessions by overseeing the distribution and collection of materials. She facilitated timely data processing by efficiently scoring participant response booklets with colleagues and maintained the integrity of experimental sessions by managing participant entry.

True Colors, Inc. (January 2019 to May 2019). Caitlin worked as an intern to supervise vendors at the True Colors Annual Conference, which is the largest consistently run LGBTQ+ youth conference in America. She coordinated check-in and check-out, responded to vendor needs, and directed guests. She also secured donations, identified potential donors, established correspondence, and facilitated donation process. Caitlin redesigned presentation materials to best represent True Colors' current mission and achievements.

University of Hartford's Department of Communication (September 2018 to May 2020). Caitlin worked as an office assistant to streamline faculty responsibilities by completing

deliveries, filing documents, and tackling office projects. She monitored departmental computer lab, assisted students, and maintained an environment conducive to productivity. Caitlin also served as a representative for the department at University events.

Mary Corley

Proposed Project Role:	EQA Staff Support
Role at BerryDunn:	Proposal Writer with BerryDunn since 09/2019
Years of Experience Relevant to Proposed Role:	30+ years
Certifications and Education:	BA, Communication, University of Wyoming BS, Finance, University of Wyoming

Overview

Mary is a proposal coordinator with more than 30 years of document experience. Highlights of her expertise include analyzing requests for proposals (RFPs) from a legal and requirements viewpoint to help ensure the RFP is a good fit, managing all aspects of the proposal response, preparing templates and outlines for documents, gathering written responses from team members and compiling into one document, and researching and writing responses to requirements. In addition, she brings experience in formatting, styling, and editing documents.

Relevant Experience

BerryDunn (09/2019 to present). Mary serves as the lead proposal writer for BerryDunn's Medicaid Practice Area. In addition, she supports the firm's Editorial/Quality Assurance team in reviewing, formatting, and copyediting documents.

WIPRO Infocrossing (12/1989 to 09/2019).

- **Proposal Coordinator (04/2015 to 09/2019).** Mary managed all aspects of the proposal process. She reviewed government healthcare potential RFPs for legal and business requirement fit; prepared proposal templates, outlines, cover art, and labels; worked with SMEs, legal, management and writers on proposal requirements and response, ensuring all submission requirements were met; wrote original proposal content and revise developed content to fit RFP requirements; formatted and prepared the final proposal response; and created a proposal response database.
- **Contract Compliance (07/2008 to 03/2015).** Mary gathered and reported all Service Level Agreements for contract with the State of Missouri and posted to a Cognos dashboard each month. She also acted as point of contact for questions on the contract between WIPRO and the State of Missouri; gathered systems statistics (metrics) from various sources (e.g., datacenter, Lotus Notes databases, MMIS reports) and compiled the metrics utilizing Microsoft Access and Excel in spreadsheets and charts for review by internal management; and maintained ER Studio data models. In addition, Mary performed time administrator duties, including ensuring all time was entered weekly, adding new employees, removing terminated employees, creating reports.

- **Business Analyst (11/2004 to 03/2015).** Mary performed several duties in this role, including providing on-line help expertise, identifying requirements on system task requests, working with programmers to help ensure that requirements were met, and conducting system testing.
- **Provider Documentation Specialist (07/1993 to 11/2004).** Mary maintained the information base that contains the current provider, system, security and processes manuals. She helped to ensure that Missouri Medicaid manuals are current, accurate and consistent, both in content and style; and formatted and styled information and scan documents to enable viewing and printing from the Internet.
- **Document Control Supervisor (12/1989 to 06/1993).** Mary supervised a permanent staff of nine clerks and a courier and coordinated daily workflow as required by Post Office mail receipts. She maintained claim receipts inventory reports and entered and maintained batch control and provider form/label order files online.

Carolyn Del Vecchio

Proposed Project Role:	EQA Staff Support
Role at BerryDunn:	Staff Writer with BerryDunn since 10/2019
Years of Experience Relevant to Proposed Role:	5 years
Certifications and Education:	Bachelor of Arts in Political Science, Gustavus Adolphus College

Overview

Carolyn is a season writer with a history of working for local and federal offices in a communications capacity. Her ability to organize large-scale projects, as well as coordinate with smaller teams, makes her an efficient writer. She is able to focus on the overall goals of a project while also attending to the details of persuasive and clear writing.

Experience

BerryDunn (October 2019 to present). Carolyn works as a proposal writer with BerryDunn's State and Local Practice Groups to author and coordinate responses to RFPs seeking consulting services. She coordinates the various aspects of proposal development from compliance to editing to strategizing content.

Minnesota Attorney General Keith Ellison's Office (October 2018 to September 2019). Carolyn worked as a citizen assistance analyst to address questions and concerns from the public and provide resources for and guidance of the formal complaint process. She advocated for consumers by conducting written mediations between consumers and businesses in attempt to resolve conflict and uphold consumer protection laws, including landlord and tenant disputes.

U.S. Department of State (August 2017 to June 2018). Carolyn was a Fulbright Fellow that instructed 450 students in speaking, listening, and writing from beginner to advanced levels of English literacy. She organized festivals, clubs, and holiday celebrations to facilitate cultural exchange.

Gustavus Adolphus College (September 2016 to May 2017). Carolyn worked as a writing tutor to review, revise, and improve writing assignments for over 150 students.

Three Rivers Park District (January 2015 to May 2016). Carolyn worked as an education outreach coordinator to plan and lead a pilot program that provided weekly subsidized environmental education summer camps for low-income students around the Twin Cities metro which received the MNPRA Award of Excellence.

Minnesota Interfaith Power and Light (January 2015 to May 2016). Carolyn worked as communications coordinator intern to organize and collaborate with a network of 60+ nonprofits

to plan the Minnesota Clean Energy and Jobs Day at the Capitol with over 400 attendees to lobby for renewable energy.

Building Bridges (September 2014 to December 2015). Carolyn worked as a social justice conference organizer to coordinate, fundraise, and create marketing for a student-led social justice conference on gender equity with keynote speakers Senator Amy Klobuchar and Jessica Valenti.

Karla Fossett, MFA, Prosci® CCP

Proposed Project Role:	EQA Staff Support
Role at BerryDunn:	Senior Content Administrator with BerryDunn since 11/2012
Years of Experience Relevant to Proposed Role:	10 years
Certifications and Education:	MFA, Creative Writing, Stonecoast MFA Program, University of Southern Maine BS, Film, Boston University College of Communication Prosci® Certified Change Practitioner

Overview

Karla provides content management, technical writing, and proposal development assistance for BerryDunn's Consulting Team in support of our client engagements and internal consulting operations. Through her work supporting BerryDunn client engagements, together with her prior work in training development and delivery, she has a strong foundation of knowledge and hands-on experience for providing project management support for the Bureau.

Relevant Experience

BerryDunn (11/2012 to Present). Karla serves in multiple roles for BerryDunn's Consulting Team, primarily in support of the Business Development team. She serves as the senior content administrator for the firm's proposal automation software, managing a content library of 2000+ entries. She also supports the firm's Editorial/Quality Assurance team. Prior to this role, she has served as a proposal coordinator, technical writer and editor, and administrator for BerryDunn KnowledgeLink, a customized Microsoft SharePoint tool.

Delhaize America (03/2012 to 11/2012). As a documentation specialist, Karla created, revised, and maintained Standard Practice Training Aids for multiple corporate departments; graded associates' training exercises; assisted in training for the Master Network Pricing Project; and developed several corporate-wide communications.

EZAuctionNet (09/2010 to 02/2012). Karla served as a copy writer and research master. Her position entailed writing product advertisements, conducting extensive product research, and assisting with product handling and maintenance.

Carole Ann Guay

Proposed Project Role:	EQA Staff Support
Role at BerryDunn:	Project Coordinator with BerryDunn since 10/2014
Years of Experience Relevant to Proposed Role:	14 years
Certifications and Education:	Currently working towards BS in Accounting, University of Southern Maine

Overview

Carole Ann is an experienced project coordinator and technical analyst. She is a dependable individual contributor and works to a cohesive team member. She has excellent organizational skills that she applies to her client project work.

Relevant Experience

BerryDunn (10/2014 to present). Carole Ann serves as a project coordinator for BerryDunn's government consulting group, with additional administrative duties. Selected project work includes:

- **Oregon Enterprise Technology Services (OR ETS) – Integrated IT Service Management (ITSM) (03/2018 to present).**
Carole Ann developed high-level workflow and dataflow diagrams through on-site meetings as well as conference call sessions.
- **Colorado Office of the State Auditor – IT Evaluation (09/2017 to present).**
Carole Ann coordinates document request items, status reports, meeting requests, and data management.
- **New Mexico Corrections Department (NMCD) – COTS Offender Management System (OMS) Replacement (11/2016 to present).**
Carole Ann compiles weekly status reports and participates in interviews as well as survey analysis.
- **Metropolitan Government of Nashville and Davidson County (Metro), TN – Information Security Program Development (05/2016 to present).**
For Metro's, development of their Information Security Management Program, Carole Ann worked as a project coordinator, assisting in the development of findings reports. In addition, she served as part of the team performing a Payment Card Industry (PCI) Readiness Assessment. These activities included identifying Metro's current state of PCI, identifying where PCI data resides and where it traverses the network.
- **Vermont Department of Vermont Health Access – Vermont Health Connect Financial**

and Programmatic Audit (01/2016 to present).

BerryDunn has performed the State's financial and programmatic audit of its Health Insurance Exchange for FYE 6/16 and is in the process of performing the FYE 6/17 audit. Carole Ann currently serves as the project coordinator on this audit to determine whether the exchange is in material compliance with 45 CFR 155.

- **Minnesota Health Benefit Exchange (MNsure) – Programmatic Audit (10/2015 to present).**
BerryDunn is performing the programmatic audit for the State's health insurance exchange. Carole Ann is the project coordinator for BerryDunn's audit team assessing whether MNsure's program is compliant with all federal requirements.
- **Sacramento Municipal Utility District (SMUD) – Information Security Audit (08/2016 to 12/2017).**
Carole Ann provided documentation support and deliverable assistance for SMUD's Information Security Audit.
- **West Virginia Department of Health and Human Resources (DHHR) – Eligibility and Enrollment Independent Security and Privacy Controls Assessment (01/2017 to 07/2017).**
Carole Ann served as an analyst for West Virginia Eligibility and Enrollment (E&E) Independent Security and Privacy Assessment project. The independent assessment was completed against the CMS MARS-E v2.0 framework.
- **Massachusetts State Ethics Commission – CMS Planning and Implementation Services (04/2017 to 06/2017).**
Carole Ann provided deliverable support, as well as data gathering and organization for this project. She also participated in on-site fact-finding meetings.
- **Washington State Auditor's Office (SAO) – Local Government IT Security Audits (11/2014 to 06/2017).**
Carole Ann served as a technical analyst assisting in the performance of information security audits for various municipalities throughout the State of Washington, sponsored by the SAO, conducting assessment activities and analysis of current environments. The team assisted in identifying threats, vulnerabilities, and risks, in addition to providing recommendations for remediation.

Webber Energy Fuels (2004 to 2014). As the office coordinator, Carole Ann oversaw several operations, including payroll for office staff of 30 employees, Daily Product Control of fleet deliveries, the balancing and reconciling of previous day's postings, credit checks and opening of all new accounts, and the cash drawer and accounts receivable. She worked directly with sales and service ensuring new customer satisfaction, and directly assist the branch manager in all daily office operations.

Molly Hawkinson

Proposed Project Role:	EQA Staff Support
Role at BerryDunn:	Staff Editor with BerryDunn since 09/2019
Years of Experience Relevant to Proposed Role:	3 years
Certifications and Education:	Certificate, Editing, University Of Washington BS, Media And Communication, New York University

Overview

Molly is a staff editor on BerryDunn's Editorial/QA team who copyedits and proofreads internal and client-facing documents. She also develops and presents educational materials to teach consultants and other members of the firm best practices for business writing. She holds a Certificate in Editing from the University of Washington and a Bachelor of Science degree from New York University.

Relevant Experience

BerryDunn (09/2019 to present). Molly is responsible for proofreading, copyediting, and formatting various types of documents, including proposals, reports, memos, presentations, and meeting notes. She also develops presentations and other educational materials, such as monthly e-blasts, for the firm, and effectively manages multiple projects with different deadlines.

Rev (2018 to 2019). Molly served as a video captioner, captioning videos for documentaries, commercials, and short films. She followed house style guide and received consistent high reviews from clients.

Sirius XM Radio (01/2009 to 05/2009). As an intern, Molly monitored and maintained social media for a daily four-hour radio show. She wrote and edited daily blog and show recaps, conducted interviews, and created content read live on the air.

Kyle Melton

Proposed Project Role:	EQA Staff Support
Role at BerryDunn:	Staff Editor with BerryDunn since 02/2021
Years of Experience Relevant to Proposed Role:	19 years
Certifications and Education:	BA, History, Minor: Philosophy, University of Dayton Associate's Degree, Business Administration, Sinclair Community College

Overview

Kyle is an experienced proofreader with a demonstrated history of working in the marketing and advertising industry. He is skilled in page layout, fact-checking, magazines, AP Stylebook, corporate brand guidelines, and copy editing.

Relevant Experience

BerryDunn (02/2021 to present). Kyle serves as an editor for BerryDunn's Consulting Team, tasked with proofreading and copyediting meeting notes, memos, and PowerPoint presentations for various government entities. This requires helping to ensure that documents conform to BerryDunn's formatting and writing standards.

SPI Global/Tighe Publishing Services (11/2018 to present). Kyle serves as a fact-checker for middle school science programs. He composes captions for middle/high school social studies programs, and coordinates with editorial team to ensure quality and adherence to deadlines.

Cenveo (06/2017 to present). As a freelance contractor, Kyle fact-checks state-based Social Studies programs. He also coordinates with editorial team to ensure quality and adherence to deadlines.

FiveHundred Degrees Studio (10/2015 to 07/2020). As a senior proofreader, Kyle supervised reviews of advertising copy for high-profile clients, as well as internal documentation. He adhered to AP style, as well as highly detailed client guidelines, and helped to ensure high-quality content in a fast-paced, detail-oriented work environment with locations in Columbus, OH, Miami, FL, and Toronto, Ontario, Canada.

Westchester K-12 Publishing Services (11/2017 to 2018). As a freelance contractor, Kyle fact-checked state-based Social Studies programs. He also proofread and copyedited for international Social Studies program.

Parts Express (2016 to 2017). Kyle wrote technical articles for electronics warehouse magazine. He also coordinated with editor to ensure focus of stories and deadlines and delivered engaging technical writing in AP style for quarterly publication.

SBC Advertising (10/2015 to 09/2017). Kyle reviewed advertising copy for high-profile clients, as well as internal documentation. He adhered to AP style, as well as highly detailed client guidelines, and helped to ensure high-quality content in a fast-paced, detail-oriented work environment.

Ertel Publishing (2014 to 2015). Kyle reviewed copy for two national bi-monthly magazines on tight deadlines. He adhered to technical specifications and internal style guidelines, and coordinated with two editorial teams to ensure quality control.

Dayton City Paper (2010 to 2014). As the editor, Kyle directed editorial content for arts/culture alt weekly in the Greater Dayton, OH region. He managed external media contacts to coordinate interviews/images for the weekly edition, and coordinated with the Publisher and Art Director on weekly edition content and layout.

From 2010 to 2012, Kyle also served as the first Music Editor for this publication, based on expertise in the field.

Cengage Learning-Contemporary Musicians (2010 to 2012). Kyle created career biographies for secondary level students on current musical artists. This included synthesizing secondary source material into narrative and coordinating with his advisor to meet deadlines.

Mazer Corporation (2002 to 2007). Kyle edited K-12 education materials for state and national programs in Social Studies, English and Technology. He coordinated with external writers to make revisions and meet strict deadlines, and fact-checked primary and secondary source materials.

Bethany Pike

Proposed Project Role:	EQA Staff Support
Role at BerryDunn:	Project Coordinator with BerryDunn since 07/2012
Years of Experience Relevant to Proposed Role:	17 years

Overview

Bethany is a project coordinator with BerryDunn's Consulting Team, based in Phoenix. She has over 20 years of experience working in consulting, compliance, and financial services, serving in client-facing roles that have leveraged Bethany's exceptional organizational skills, strong attention to detail, outstanding client service, and clear written and verbal communication skills.

Relevant Experience

BerryDunn (07/2012 to present). Bethany has served in multiple roles at BerryDunn, with progressive levels of responsibility that leverage her strong organizational skills, knowledge of the firm's services and processes, and collaborative work style.

- **Project Coordinator (07/2019 to present).** Bethany works with our consulting team on engagements in the West to keep project tasks and deliverables on track, maintain our project collaboration SharePoint site (BerryDunn KnowledgeLink), perform document quality review, and assist with meetings and other on-site activities.
- **Contracts Administrator (07/2016 to 06/2019).** Bethany minimized firm risk by consistently administering subcontractor legal documentation and helping to ensure that all aspects of each contract were being fully executed, helping to ensure the firm complies with contractual and regulatory requirements. In addition, she established and executed processes to streamline legal documentation for the firm, and elevated risks as needed to firm leadership.
- **Contracts Coordinator (04/2013 to 07/2016).** Bethany established processes and strengthened workflows related to managing and maintaining subcontractor and contracts documentation, leveraging the firm's document management system and other technologies. She maintained extensive face-to-face, written, and oral communications with clients, prospects, subcontractors, and internal stakeholders.
- **Administrative Assistant (07/2012 to 04/2013).** Bethany edited, proofread, and conducted quality reviews of client deliverables and other work products developed by our Government Consulting Group. In addition, she provided support for various aspects of our consulting work.

Vigilant Capital Management (02/2011 to 05/2012). As Client Relationship Administrator, Bethany completed new account documentation and assured that assets were received in a timely fashion; processes gifts of stocks; executed bill paying and beneficiary disbursements; prepared quarterly statements and tax documentation; and maintained extensive face-to-face, written, and telephone communication with clients, prospects, and centers of influence.

Spinnaker Trust (02/2006 to 02/2011). As Trust Operations Administrator, Bethany performed operational functions within Spinnaker Trust's accounting software; input, tracked, and processes fees; processed gifts of stocks; executed bill paying and beneficiary disbursements; administered approximately 125 IRA accounts; coordinated and gathered relevant information for 5498s and 1099Rs; processed daily operational transactions; proofed accounting transactions; and conducted cost basis research.

Maine Bank & Trust (02/1998 to 01/2006). As Trust Administrator, Bethany maintained extensive face-to-face, written, and telephone communication with clients, prospects, and centers of influence; administered approximately 450 accounts; reviewed trust documents; completed discretionary memorandums; completed new account documentation and assurances that assets were received in a timely fashion; and executed bill paying and beneficiary disbursements.

Jordan Ramsey

Proposed Project Role:	EQA Staff Support
Role at BerryDunn:	Staff Editor with BerryDunn since 06/2018
Years of Experience Relevant to Proposed Role:	10 years
Certifications and Education:	MA, English: Professional Writing, Southeastern Missouri State University BA, Liberal Arts and Sciences, English Literature and Creative Writing, University of Illinois at Urbana-Champaign

Overview

Jordan is an editor and proofreader in BerryDunn's Government Consulting Group and a member of the Editorial/QA team. He provides document quality assurance and editing for BerryDunn client deliverables and marketing/communications documents.

Relevant Experience

BerryDunn (06/2018 to present). Jordan supports BerryDunn's consulting groups by providing copyediting, proofreading, formatting, and other quality assurance tasks for various types of documents, including client deliverables and marketing/communications content. He also assists in providing new-hire orientation to BerryDunn employees to help them understand the Editorial/QA department's review process and firm style guidelines.

Portland Adult Education (2019). Jordan delivered writing instruction to international students and taught Level 100 and 200 English courses. In addition, he was responsible for assessments and level placement for students.

Pearson Smarthinking Writing Lab (2017). Jordan revised and edited a variety of essays, working under strict deadlines and providing personalized feedback to help students strengthen their technical writing, creative writing, career writing, and English-as-a-Second Language skills.

Southeast Missouri State University (2015 to 2017). As a graduate assistant, Jordan taught English Composition and aided in the delivery of the Introduction to Creative Writing course, leading workshops in poetry and fiction and facilitating group work. In addition, he wrote book reviews and reviewed authors' submissions for the *Big Muddy*, an online journal published by the Southeast Missouri State University Press.

As a writing tutor, he assisted students with their writing in both face-to-face and online settings and scored writing proficiency exams.

As publications assistant, Jordan proofread and edited copy for campus-wide publications and wrote copy for advertising documents.

The Southern Illinoisan (2014 to 2015). As copy editor, proofreader, and sports clerk, Jordan wrote and edited articles and prepared them for publications. In addition, he wrote headlines and subheads for articles and reviewed content to help ensure it was published error-free.

Other Teaching Experience (2006 to 2010). Lanier Technical College: As adjunct instructor, Jordan created curriculum and instruction of multiple English courses, including Remedial English, Introduction to Composition, and Technical Writing. He taught approximately 90 students per quarter and served as English tutor for the College Student Success Program.

Hardin County, IL: Jordan taught English at the elementary, middle, and high school levels as a substitute teacher.

NOVA Group of Japan: Jordan worked as an English instructor, teaching conversational English to students with varying degrees of English literacy.

Jonathan Williams

Proposed Project Role:	EQA Staff Support
Role at BerryDunn:	Staff Editor with BerryDunn since 02/2019
Years of Experience Relevant to Proposed Role:	15 years
Certifications and Education:	BA, English, Bowling Green State University Member of Golden Key National Honor Society Member of Alpha Lambda Delta Honors Society

Overview

Jon is an experienced writer and editor, bringing 15 years of experience in proofreading and copyediting professional writing across several industries. He works with BerryDunn's consulting teams to review and revise written documentation before being submitted to clients.

Relevant Experience

BerryDunn (02/2019 to present). Jon serves as an editor for BerryDunn's Government Consulting Group, tasked with proofreading and copyediting meeting notes, memos, and PowerPoint presentations for various government entities. This requires helping to ensure that documents conform to BerryDunn's formatting and writing standards.

Freelance Proofreader and Copy Editor (11/2010 to present). Jon has worked with Ertel Publishing to proofread various niche magazines, as well as with Gypsy Publications to copy edit children's books, novels, and various other local publications.

Midwest Tape (11/2004 to present). Jon proofreads monthly catalogs and weekly newsletters, as well as various other printed and digital documents. He writes copy for advertisements, service brochures, the company blog (www.mwtnewsandviews.com), social media, and other projects.

Mitchell Equipment Corporation (02/2002 to 11/2004). First as a visual software operator and later as a purchasing manager, Jon was responsible for contacting vendors to purchase items needed for manufacturing jobs, for stock, or for general shop or office use. He worked with Engineering and Sales to determine needs and order accordingly, met with current and potential vendors. Schedule service or maintenance for equipment, operated manufacturing software, and served as office/shop liaison.

Spring Hill Nurseries (02/2001 to 06/2001). Jon proofread catalogs and mailing pieces for this direct-mail horticulture group. He checked facts, layout, grammar, and spell, as well as wrote copy for planning guides included with shipments.