



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: 05-04-2022

CORRECT ORDER NUMBER MUST APPEAR
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CONCERNING THIS ORDER SHOULD BE
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CONTACT.

Order Number:	CDO 0506 3022 WIC2200000003 1	Procurement Folder:	1015822
Document Name:	BerryDunn Product Management Services for WIC Crossroads MIS	Reason for Modification:	
Document Description:	BerryDunn Product Management Services for WIC Crossroads MIS		
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: Billie S Hancock Requestor Phone: 304-356-4097 Requestor Email: billie.s.hancock@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 - NUTRITION SERVICES 350 CAPITOL ST, RM 519 CHARLESTON WV 25301-3717 US	PURCHASING DIRECTOR 304-356-4116 HEALTH AND HUMAN RESOURCES BPH - NUTRITION SERVICES 350 CAPITOL ST, RM 519 CHARLESTON WV 25301-3717 US

Total Order Amount: \$1,381,155.00

Purchasing Division's File Copy

ENTERED

CH 5/6/22

PURCHASING DIVISION AUTHORIZATION
DATE: *Linda Harper 5/9/22*
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION
DATE: *Beverly Toler 5-9-22*
ELECTRONIC SIGNATURE ON FILE

Extended Description:

BerryDunn Product Management Services for WIC Crossroads MIS System

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$7,830.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-18	2024-09-30				

Commodity Line Description: Contract Manager: Base Year One

Extended Description:

Contract Manager

Hourly Rate: \$270.00

29 Hours

Nicole Becnel

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$49,880.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-18	2024-09-30				

Commodity Line Description: Project Principal: Base Year One

Extended Description:

Project Principal: Base Year One

Hourly Rate: \$215.00

232 Hours

Charlie Leadbetter

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$1,018,325.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-18	2024-09-30				

Commodity Line Description: Co-Product Manager: Base Year One

Extended Description:

Co-Product Manager: Base Year One

Hourly Rate: \$175.00

5819 Hours

Julie Sullivan

Warren Graver

Danni Ricks

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$139,200.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2022-05-18	2024-09-30				

Commodity Line Description: Business Analyst: Base Year One

Extended Description:
Business Analyst: Base Year One

Hourly Rate: \$80.00
1740 Hours

Andrew Oliver

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
5	80101600	0.00000		\$0.0000	\$139,200.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2022-05-18	2024-09-30				

Commodity Line Description: Staff Support: Base Year One

Extended Description:
Staff Support: Base Year One

Hourly Rate: \$80.00
1740 Hours

Erica Hoffman

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
6	80101600	0.00000		\$0.0000	\$26,720.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2022-05-18	2024-09-30				

Commodity Line Description: Editing/QA: Base Year One

Extended Description:
Editing/QA: Base Year One

Hourly Rate: \$80.00
334 hours

Mary Corley
Carolyn del Vecchio
Christine Fisher
Karla Fossett
Carole Ann Guay
Molly Hawkinson
Kyle Melton
Bethany Pike
Jordan Ramsey
Jon Williams
Caitlin Cabral



Office of Nutrition Services Crossroads User Group Product Management Office

Staffing Plan and Scope of Work
Prepared for HHR21*3

Submitted by:

Nicole Becnel, PMP®, Contract Manager
Charlie Leadbetter, PMP®, Project Principal
Julie Sullivan, MPH, MBA, PMP®, Engagement Manager
Warren Graver, MBA, Co-Product Manager
Danni Ricks, Co-Product Manager
BerryDunn
300 Capitol Street | Charleston, WV 25301 | 207-541-2200

Submitted on:

February 3, 2022

berrydunn.com

Staffing Plan and Scope of Work (SOW) for the Office of Nutrition Services (ONS) Crossroads User Group (XRUG), Product Management Office (PMO)

1.0 Key Information

1.1 Background Information

The West Virginia (State) Department of Health and Human Resources (DHHR) Bureau for Public Health (BPH) ONS has requested continuation of product management and support services for the multi-state collaborative user group for the Crossroads management information system. Funding for the PMO is through the US Department of Agriculture (USDA) Food and Nutrition Service (FNS), and is contingent upon the availability of federal funds.

The XRUG was created in response to an initiative of the USDA FNS Special Supplemental Nutrition Program for Women, Infants, and Children (WIC) aimed at increasing efficiencies and cost-effectiveness across states by encouraging collaboration and system reuse. Known as the State Agency Model (SAM), this initiative is focused on planning, development, and deployment of model management information systems (MIS) in WIC state agencies (SAs).

The XRUG is a consortium of the WIC SAs from Alabama, Rhode Island, Virginia, and West Virginia. Alabama, Virginia, and West Virginia were part of the original consortium—along with North Carolina—that awarded a contract to Computer Sciences Corporation (CSC) in 2009 to build a SAM system called Crossroads. North Carolina is no longer part of the consortium. Since the initial contract award, CSC has been acquired and is now known as Gainwell Technologies.

Created by the XRUG Charter, the XRUG has established processes to maintain and enhance Crossroads and is the vehicle to support all SA members, including new members who implement Crossroads. The XRUG manages the Crossroads system, supports the SAs, and plays various roles in system-related processes and activities. The XRUG SAs, together with the support of the Maintenance & Enhancement (M&E) contractor and PMO, are responsible for ensuring the integrity and usability of the product.

This work will be completed in accordance with the terms and conditions of the base contract between BerryDunn and DHHR.

The intent of this document is to help ensure a common understanding of expectations as they relate to the deliverables and services that will be provided by the PMO for ONS and the XRUG.

The primary objectives of the PMO include, but are not limited to:

- Provide oversight of XRUG operations, including:
 - Serving as the point-of-contact (POC) for all XRUG communications
 - Managing risk and risk mitigation
 - Assisting with the SAM Transfer Process
 - Overseeing the XRUG annual report
 - Coordinating the annual XRUG meeting
 - Assisting with M&E vendor contract administration and management
- Managing the Crossroads Change Control Process and activities, including:
 - Recommending and prioritizing Crossroads changes
 - Facilitating Change Control Board (CCB) and Task Force (TF) meetings and communications
 - Providing subject matter expertise (SME)
 - Leading and participating in software development life cycle (SDLC) activities
- Serving as the central source for Knowledge Management and Collaboration, including:
 - Facilitating meetings and conference calls
 - Maintaining the XRUG Charter and other documents
 - Managing the M&E collaboration site
 - Managing the Secure Sockets Layer (SSL) website for electronic content storage and management.
- Assisting with Request for Proposal (RFP) development, release, and evaluation.

1.2 Assumptions

Estimates for this SOW are based on the following assumptions:

- The work, which is projected to be conducted over 29 months (estimated from May 1, 2022 – September 30, 2024), will begin upon a mutually-agreed upon date. In June 2021, BerryDunn was awarded a new three-year contract with DHHR, plus

three optional renewal years. In order to maintain consistency and uninterrupted service, this SOW covers the two remaining base years of the contract.

- Assuming a start date of May 1, 2022, the work would then conclude on September 30, 2024. The end date of this SOW will exceed the expiration of BerryDunn's Master Agreement (CDO HHR 21*03); BerryDunn will honor the current pricing, terms, and conditions included in the current approved Master Agreement for the duration of this CDO.
- The Hours Estimate is based on a good faith calculation of level of effort of the PMO activities, as well as institutional knowledge gained as the PMO incumbent.
- The Hours Estimate accounts for approximately 3.75 full-time employees (FTEs). If the actual level of effort increases or additional service requests are made it may result in a change request to the contract. Only hours utilized for management of the PMO will be billed.
- The BPH project sponsor is WIC Director Heidi Staats. The DHHR project leads are Melinda Westfall, Lisa Donohew, and Kathy Legg. BerryDunn encourages ONS to consider requesting a resource from the Office of Management Information Services (OMIS) to support system needs.
- The BerryDunn leadership team will consist of Nicole Becnel serving as Contract Manager, Charlie Leadbetter as Project Principal, and Julie Sullivan (Public Health Practice Lead), Warren Graver, and Danni Ricks as Co-Product Managers.
- ONS key staff and XRUG SA staff will be available to participate when necessary throughout this project.
- The DHHR project sponsors and leads will provide timely decision-making and responses to information requests from the BerryDunn project team.
- All project documents—including meeting notes, action items, issues, risks, and decisions—will be maintained on BerryDunn's collaborative Microsoft SharePoint site. The BerryDunn team will notify relevant project stakeholders, as appropriate, when key documents are uploaded.
- Deliverables will be provided in an agreed-upon format using Deliverable Expectations Documents (DEDs).
- BerryDunn is not responsible for costs for SA staff to attend the Annual User Group Meetings (e.g., hotels, travel, food, conference room rental).

2.0 Project Scope and Staffing Plan

Table 1 describes the service approach, deliverables, and completion criteria for BerryDunn's services; identifies BerryDunn team members responsible for conducting our work; and lists the estimated hours for completion of each key task. We anticipate that the actual needs of the project may vary and could require different allocation of our total hours to work activities than we have estimated at this time. A deliverable requires formal submission and approval, while an artifact is a document produced by the BerryDunn team during project work that serves as an input to one or more deliverables but might not be formally submitted for State feedback (unless requested). Descriptions of the roles are located in section 3.0 of the SOW. A high-level timeline for the activities described below is provided in Section 4.0.

Table 1: Service Approach, Deliverables, Completion Criteria, and Hours Estimate

Task	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
1.0	Project Management and Annual Updates/Revisions <i>Service Approach</i> BerryDunn will:	Nicole Becnel	
	1.1 BerryDunn's project leadership team will provide oversight and coordination of BerryDunn staff, services, and deliverables.	Charlie Leadbetter	
	1.2 BerryDunn's team will host an annual Strategic Planning Meeting (D01) with representatives from key stakeholder groups such as the Executive Steering Committee (ESC), CCB, and M&E contractor, as appropriate. Topics may include introducing new team members; clarifying the project goals and objectives for the coming year; discussing communication protocols; reviewing high-level project milestones; and identifying project risks, including the documentation of existing risks from previous years. Due to Covid-19 and CDC guidance, meetings will continue to be held virtually until restrictions have been lifted. Should travel be required by SAs, these costs will be paid by each individual state.	Julie Sullivan	
	1.3 BerryDunn will update the current Product Management Plan (D02) and Project Work Plan/Schedule (D03). The Product Management Plan (PMP) will outline how the project will be managed, executed, and controlled. The PMP will include details relating to management of project processes in alignment with Project Management Institute (PMI) standards and the Project	Warren Graver Danni Ricks Andrew Oliver Erica Hoffman	Year 1: 365 Year 2: 365 Year 3 (partial): 152 Total: 882
		<i>Editing and Quality Assurance (EQA) Team:</i> Mary Corley Carolyn del Vecchio Christine Fisher Karla Fossett Carole Ann Guay Molly Hawkinson	

Task	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	<p>Management Body of Knowledge (PMBOK). Processes include:</p> <ul style="list-style-type: none"> • Communications Management • Risk and Issue Management • Decision Management • Stakeholder Management • Scope Management • Project Integration Management • Quality Management/Quality Control Plan • Cost Management • Schedule Management <p>The Project Work Plan/Schedule will provide the tasks, timelines, dependencies, task owners, and high-level milestones for the project. It is expected that the work plan/schedule will be progressively elaborated upon as the project progresses, i.e., detailed tasks and sub-tasks will be added and/or updated as new information is gathered and decisions are made.</p> <p>1.4 BerryDunn will maintain the shared collaboration website (the XRUG M&E Collaboration Site) for project documents using BerryDunn's customized version of Microsoft SharePoint (D16). We will provide appropriate role-based access to SharePoint to Crossroads stakeholders. We will also provide training sessions and materials on how to use SharePoint.</p> <p>1.5 The BerryDunn PMO team will participate in Crossroads system training as determined by the XRUG.</p> <p><i>Deliverables</i></p> <p>D01 Annual Strategic Planning Meeting</p> <p>D02 XRUG Annual Product Management Plan Revisions/Updates</p> <p>D03 XRUG Annual Project Work Plan/Schedule Revisions/Updates</p> <p><i>Completion Criteria</i></p> <p>Project Management and Annual Updates/Revisions will be deemed complete upon signature acceptance of deliverables for this task by the State project sponsor(s) or his/her designee.</p>	<p>Kyle Melton Bethany Pike Jordan Ramsey Jon Williams Caitlin Cabral</p>	

Task	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
2.0	<p>XRUG Product Management</p> <p><i>Service Approach</i></p> <p>Throughout the contract duration, XRUG oversight services BerryDunn will provide include the following:</p> <p>2.1 BerryDunn's team will be responsible for the execution, control, and monitoring of PMO activities in accordance with the approved Product Management Plan (D02).</p> <p>2.2 BerryDunn will be the POC for XRUG communications as agreed upon by the ESC. Communication activities include:</p> <ul style="list-style-type: none"> • Acting as the liaison between and providing feedback to the XRUG, FNS, and contractors • Answering XRUG-related emails and phone calls • Providing information regarding product details, schedules, XRUG activity, resource locations, etc. • Providing and maintaining documentation such as meeting notes, status reports, schedules, risks, governance documents, and change requests <p>2.3 BerryDunn will identify and manage risks with the potential to negatively impact the XRUG and Crossroads system by:</p> <ul style="list-style-type: none"> • Facilitating risk mitigation discussions and strategy creation with the ESC during scheduled and ad hoc meetings • Tracking progress and updating documents and action plans • Reporting on the risks via the twice-monthly ESC meetings and the monthly PMO Status Reports (D04) <p>2.4 BerryDunn will coordinate and facilitate an ESC meeting twice a month to discuss the status of XRUG tasks and projects. BerryDunn will use this time to make the ESC aware of risks, issues, and/or items that may require their attention and plan responses.</p> <p>2.5 BerryDunn will provide monthly PMO Status Reports (D04) to the ESC that contain updates on PMO and XRUG accomplishments and activities during the reporting period; PMO and XRUG planned activities for</p>	Same	<p>Year 1: 807</p> <p>Year 2: 807</p> <p>Year 3 (partial): 347</p> <p>Total: 1,961</p>

Task	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	<p>the following reporting period; key decisions, risks, and issues; and product schedules.</p> <p>2.6 BerryDunn will act as the POC for the XRUG contribution to the SAM Transfer Process, which includes:</p> <ul style="list-style-type: none"> • Acting as central POC for member and non-member SAs regarding the XRUG, the Crossroads System, and implementation requirements • Identifying and providing documents relating to transfer of the Crossroads System, including technical resources, lessons learned, etc. • Creating and delivering presentations about the XRUG, as requested by the ESC <p>2.7 BerryDunn will develop an Annual State of XRUG Report (D05). In order to complete the report, we will:</p> <ul style="list-style-type: none"> • Create an assessment process to gather feedback from XRUG, including identifying participants, creating questions related to satisfaction with processes, and validating these with ESC • Execute the assessment process and document all results • Brief the XRUG on the state of the XRUG and the Crossroads System at the Annual Meeting • Deliver a status report to the ESC based on discussion at the Annual Meeting (D06) detailing action plans to track progress <p>2.8 BerryDunn will identify meeting goals and content, create agendas, provide facilitation for sessions, and generate meeting notes (D13). Section 6.0 provides additional details regarding this task.</p> <p><i>Deliverables</i></p> <p>D04 Monthly XRUG PMO Status Reports</p> <p>D05 Annual State of XRUG Report</p> <p>D06 Annual XRUG Meeting</p> <p><i>Completion Criteria</i></p> <p>XRUG Oversight will be deemed complete upon signature acceptance of deliverables for this task by the State project sponsor(s) or his/her designee(s).</p>		

Task	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
3.0	<p>M&E Contractor Contract Management</p> <p><i>Service Approach</i></p> <p>Throughout the duration of the contract, M&E Contractor contract management services BerryDunn will provide are:</p> <p>3.1 BerryDunn will assist the State Contract Administration Team and/or the lead XRUG state, in the quarterly assessment of the M&E Contractor. This will include:</p> <ul style="list-style-type: none"> • Updating the prior report to assess contract performance and risk, including opportunities and challenges • Briefing the ESC and stakeholders on results, documenting actions, and tracking progress • Communicating results to the State Contract Administration Team • Summarizing information in an M&E Contractor Performance Report (D07) <p><i>Deliverables</i></p> <p>D07 Quarterly M&E Contractor Performance Report</p> <p><i>Completion Criteria</i></p> <p>Contract Management will be deemed complete upon signature acceptance of project deliverables for this task by the State project sponsor(s) or his/her designee.</p>	Same	<p>Year 1: 155</p> <p>Year 2: 155</p> <p>Year 3 (partial): 65</p> <p>Total: 375</p>
4.0	<p>Advance Planning Document (APD) Support</p> <p><i>Service Approach</i></p> <p>BerryDunn will support the development and submission of the XRUG M&E APDs and updates approved by the ESC and submitted by an SA. Activities include:</p> <p>4.1 BerryDunn will facilitate and collect data to support development and submission of APDs to FNS, in compliance with the FNS 901 Handbook.</p> <p>4.2 BerryDunn will implement the APD process for the XRUG and coordinate activities regarding APD inputs and requirements. We will facilitate the decision-making process and develop and update APDs (D08)</p> <p>4.3 BerryDunn will coordinate with FNS as necessary to finalize APD submissions.</p> <p>4.4 BerryDunn will brief the ESC and other XRUG stakeholders, as appropriate, on APD status.</p>	Same	<p>Year 1: 180</p> <p>Year 2: 180</p> <p>Year 3 (partial): 75</p> <p>Total: 435</p>

Task	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	<p><i>Deliverable</i></p> <p>D08 M&E APDs and Updates (as needed)</p> <p><i>Completion Criteria</i></p> <p>APD Support will be deemed complete upon signature acceptance of project deliverables for this task by the State project sponsor(s) or his/her designee(s).</p>		
5.0	<p>CCB Process Management</p> <p><i>Service Approach</i></p> <p>BerryDunn will manage CCB processes, in accordance with the XRUG Change Control Process (CCP), including:</p> <p>5.1 BerryDunn will provide coordination and oversight for the CCB by acting as the liaison between key stakeholders such as the Designated Governing Board (DGB) and the ESC. Liaison responsibilities include briefing the ESC on CCB activities, reporting ESC decisions to the CCB, and communicating and coordinating change ideas to the M&E contractor.</p> <p>5.2 BerryDunn will facilitate CCB meetings and provide administrative support to the CCB, including:</p> <ul style="list-style-type: none"> • Ensuring documentation is available and current for CCB use, such as meeting agendas, issue-specific information, estimates, templates, meeting notes, action items, enhancement requests, change idea log, etc. (D09) • Organizing scheduled and ad hoc CCB meetings, including invitations, agendas, logistics, videoconference setup, etc. • Posting appropriate documentation to M&E collaboration site • Contributing technical expertise and other resources to assist the CCB in accomplishment of objectives • Managing the change idea log on the XRUG M&E collaboration site • Contributing to the CCB decision-making process regarding defects/enhancements, Help Desk issue tracking and resolution, funding, and other technical decisions • Ensuring that change-related documentation is complete and correctly formatted prior to dissemination to the CCB 	Same	<p>Year 1: 736</p> <p>Year 2: 736</p> <p>Year 3 (partial): 307</p> <p>Total: 1,779</p>

Task	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	<p>5.3 BerryDunn will participate in any Task Forces (TFs) by providing administrative support to TFs, including:</p> <ul style="list-style-type: none"> Assisting the CCB in forming TFs as defined in the XRUG Change Control Process document Providing technical expertise, and other resources as required, to assist TF in accomplishing objectives Collecting TF progress from the TF lead and reporting status to the CCB, DGB, and ESC <p>5.4 BerryDunn will brief the ESC on CCB and TF activity during scheduled and ad hoc ESC meetings per the XRUG Communications Plan(D02), including (D09):</p> <ul style="list-style-type: none"> Constructing and delivering briefings for the ESC Documenting ESC decisions/actions, and briefing CCB/TF(s) Updating documentation on the M&E collaboration site Communicating as single POC any change ideas to the M&E contractor to estimate the costs associated with these changes Providing assistance to SAs submitting change requests Reviewing change request documentation for completeness Communicating estimates to CCB for consideration Reviewing the quality and completeness of enhancement requests, the change idea log, and any required supporting documentation for change ideas <p>5.5 BerryDunn will manage the issue-tracking process using an Issue Log (D10) per the agreed-upon processes in the Product Management Plan (D02), including:</p> <ul style="list-style-type: none"> Ensuring known issues, enhancement requests, etc., with the Crossroads system are captured, documented, and tracked through resolution Providing information to stakeholders regarding status, workarounds, resources, risks, etc., relating to documented issues Providing basic guidance regarding the issue-tracking process for SA documentation <p>5.6 BerryDunn will identify, track, and evaluate XRUG spending and schedules related to system changes,</p>		

Task	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	<p>including:</p> <ul style="list-style-type: none"> • Maintaining documentation for all XRUG costs, including cost related to the CCP, in a Cost Log (D11) • Maintaining schedules relating to the CCP activities on the M&E collaboration site • Coordinating with the state holding the M&E contract to create a report to brief ESC quarterly on spending <p>5.7 BerryDunn will coordinate and review all maintenance and enhancement work of the M&E contractor, including:</p> <ul style="list-style-type: none"> • Collaborating with the CCB and Release Management to identify and recommend what changes will be included for each release • Reviewing issued Service Orders with the M&E contractor to ensure all Service Order documentation is complete and correct • Conducting bimonthly status calls with M&E contractor to monitor progress/issues, including scheduling the calls, documenting call minutes, and reporting to DGB, CCB, ESC, and TFs as appropriate • Verifying the quality/completeness of M&E deliverables, including validating that deliverables are complete and meet requirements per the Service Order documentation, coordinating modifications of deliverables with the M&E contractor, and reviewing to ensure documented acceptance criteria are met as defined in the XRUG Change Control Process <p>5.8 BerryDunn will support system enhancement design and development activities by:</p> <ul style="list-style-type: none"> • Participating in detailed requirements sessions with the M&E contractor, involving XRUG subject matter experts, CCB members, and TFs for requirements validation and approval. BerryDunn will participate in up to four face-to-face design sessions annually • Supporting the M&E contractor during development, including responding to questions and issues from the M&E contractor, assisting with resolution of issues, acting as the point of XRUG acceptance of 		

Task	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	<p>completed releases from the M&E contractor, confirming that deliverables are complete and ready for dissemination to the member states for testing, and maintaining a log (D12) on the M&E collaboration site of which release each member state has currently implemented with date of implementation to ensure that all remain within the current or up to two past releases of the current version</p> <p>5.9 BerryDunn will coordinate User Acceptance Testing (UAT), including:</p> <ul style="list-style-type: none"> • Coordinating and maintaining a log on the M&E collaboration site and monitoring releases to each SA test system • Verifying that SAs receive complete releases and coordinating resolution of any issues • Documenting release content on the M&E collaboration site • Coordinating with the M&E contractor and SAs to schedule releases to be transferred to state test environments • Reviewing Release Packages for accuracy • Coordinating with the M&E contractor regarding the physical transfer of Release Notes • Monitoring recording of issues to ticket priority list via conference calls with M&E contractor on a weekly basis, ensuring that SAs document issues in a ticket-tracking system located on the M&E contractor collaboration site, and that documentation of issues by SAs is complete per required information and format • Monitoring M&E contractor correction and regression testing, including coordinating with the M&E contractor regarding the scheduled correction and regression testing of identified issues, and communicating status and schedule to the XRUG via email as needed and conference calls with M&E contractor weekly • Monitor SA testing thoroughness and completeness via weekly conference calls and/or email as needed. 		

Task	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none"> Monitoring SA regression testing of repaired system, including coordinating with SAs regarding the scheduling and results of regression testing to the repaired system and updating the M&E contractor and XRUG on status via weekly conference calls <p>5.10 BerryDunn will monitor SA releases to production, including coordinating with SAs regarding the scheduling and status of each release to a production environment; maintaining a record log of which state implements each release by date (D12), documenting issues, and coordinating with SAs regarding resolutions; and updating the M&E contractor and XRUG on status via email and weekly conference calls</p> <p><i>Deliverables</i></p> <p>D09 CCB Documentation (including meeting agendas, meeting notes, decision log, and other documentation as defined by the ESC, DGB, and/or CCB)</p> <p>D10 Issue Log</p> <p>D11 Cost Log</p> <p>D12 Release Log</p> <p><i>Completion Criteria</i></p> <p>CCB Process Management will be deemed complete upon signature acceptance of project deliverables for this task by the State project sponsor(s) or his/her designee.</p>		
6.0	<p>Knowledge Management and Collaboration</p> <p><i>Service Approach</i></p> <p>6.1 BerryDunn will facilitate regular meetings and conference calls, as identified in the XRUG Communications Plan (D02), and as requested by the XRUG. A summary of recurring meetings that BerryDunn will facilitate include:</p> <ul style="list-style-type: none"> CCB Meeting: Weekly DGB Meeting: Twice Monthly ESC Meeting: Twice Monthly M&E Status Meeting: Weekly Release Management Meeting: Weekly 	Same	<p>Year 1: 1,589</p> <p>Year 2: 1,589</p> <p>Year 3 (partial): 662</p> <p>Total: 3,840</p>

Task	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none"> • Technical Advisory Group (TAG) Meeting: Monthly • Annual User Group Meeting: Annually • Strategic Planning Meeting: Annually <p>Additional as needed meetings that BerryDunn will chair or participate in, as appropriate, include:</p> <ul style="list-style-type: none"> • APD Update • Acquisition Working Group (AWG) Meetings • Closed ESC Meetings • Joint Application Design Sessions • TF Meetings • Ad hoc meetings related to XRUG Governance and/or Contract Management <p>Activities BerryDunn will perform for meetings will include: identifying meeting participants, collecting meeting topics from XRUG, identifying and communicating meeting goals, developing meeting agendas, and documenting meeting minutes, action items, follow-up items, and subjects for continued discussion (D13).</p> <p>BerryDunn will prepare and distribute agendas via email with the XRUG project lead's approval for each meeting by noon of the business day before the scheduled meeting. We will prepare and distribute approved meeting notes via email for review to appropriate staff within two business days of each meeting's completion. We will update meeting notes within three business days of receiving feedback from SA staff.</p> <p>6.2 After key meetings, BerryDunn will prepare decision documents, inclusive of the item discussed, the decision made regarding how to address the item, the date the decision was made, and who made the decision, within three business days of the meeting. In addition, in accordance with the agreed-upon decision management processes in the Product Management Plan (D02), we will maintain a consolidated decision log (D14) on the collaboration site.</p>		

Task	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	<p>6.3 BerryDunn will maintain and provide updates to XRUG documents (D15), such as the:</p> <ul style="list-style-type: none"> • XRUG Charter • CCP documentation • Communications Plan <p>Activities BerryDunn will perform include collaborating with XRUG to identify updates to the documents; validating potential changes with the ESC, DGB, and CCB; incorporating approved changes into documentation; and maintaining current versions of the documents on the collaboration site.</p> <p>6.4 BerryDunn will manage and update the XRUG M&E collaboration site. We will maintain and update the site, including managing and controlling access to the site and managing content (such as status reports, meeting minutes, etc.). We will establish a content update process to help ensure information on the site is current. In the event BerryDunn is no longer serving as the PMO, section 9.3 contains language that addresses the transfer of documents to the new PMO, or XRUG.</p> <p>6.5 We will draft letters, forms, and other documents on behalf of the ESC, upon request.</p> <p><i>Deliverables</i></p> <p>D13 Meeting Agendas and Notes</p> <p>D14 Decision Documents</p> <p>D15 Updated XRUG Documentation</p> <p>D16 XRUG M&E Collaboration Site (BerryDunn SharePoint)</p> <p><i>Completion Criteria</i></p> <p>Knowledge Management and Collaboration will be deemed complete upon signature acceptance of the Project Completion Summary by the State project sponsor(s) or his/her designee.</p>		
7.0	<p>M&E Contractor Re-Procurement Support</p> <p><i>Service Approach</i></p> <p>In collaboration with FNS, the Virginia Office of Purchasing and General Services, and other key stakeholders,</p>	Same	498

Task	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	<p>BerryDunn will provide support for the re-procurement of the M&E contractor. Activities include:</p> <p>7.1 BerryDunn will assist with developing requirements for the Crossroads system M&E contractor RFP, developing other RFP sections (such as the procurement schedule and evaluation approach), and assembling other RFP sections (e.g., terms and conditions).</p> <p>7.2 BerryDunn's team will support the State with the procurement process, including overseeing pre-bid activities such as responding to bidder questions.</p> <p>7.3 BerryDunn will oversee and facilitate the bidder evaluation process, including developing evaluation materials—such as training documents and an evaluation workbook—facilitating scoring meetings, and providing post-meeting summary scoring documentation (D17).</p> <p><i>Deliverable</i></p> <p>D17 Crossroads M&E Evaluation Materials</p> <p><i>Completion Criteria</i></p> <p>M&E Contractor Re-Procurement Support will be deemed complete upon finalization of the RFP and the evaluation process.</p>		
8.0	<p>Project Closeout/Transition Out</p> <p><i>Service Approach</i></p> <p>During project closeout and the transition-out period, services BerryDunn will provide are:</p> <p>8.1 BerryDunn will develop a detailed Transition-Out Plan (D18), inclusive of a schedule with milestones that is approved by the ESC within 90 business days of execution of the incoming PMO contractor's contract. The Transition-Out Plan will include activities such as providing transition support to the incoming PMO contractor; providing the incoming PMO contractor with documentation, reports, templates, etc.; and training and coaching the incoming PMO contractor on PMO operations and procedures.</p> <p>8.2 BerryDunn will execute the Transition-Out Plan by providing transition support to the incoming PMO contractor to ensure uninterrupted service support to</p>	Same	124

Task	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	<p>the XRUG and member SAs for 30 business days prior to the end of the contract.</p> <p>8.3 BerryDunn will support the transfer of the PMO collaboration site content and ensure successful migration to the incoming PMO contractor's site.</p> <p>8.4 BerryDunn will prepare and submit a Project Completion Summary (D19) to document the work performed related to this SOW and provide the disposition of deliverables, action items, risks, issues, etc. We will conduct a project closeout meeting with key project stakeholders to review the summary and capture lessons learned.</p> <p><i>Deliverables</i></p> <p>D18 Transition-Out Plan</p> <p>D19 Project Completion Summary and Closeout Meeting</p> <p><i>Completion Criteria</i></p> <p>This project will be deemed complete upon signature acceptance of the Project Completion Summary and Transition-Out Plan by the State project sponsor or his/her designee.</p>		
Total Hours			9,894
Total Not-to-Exceed Cost			\$1,381,155

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. Please note that all possible staff from the Editing and Quality Assurance teams have been included to minimize the need for individual approvals following execution of this SOW. Any resources other than those included in Table 2 will be submitted for approval as needed. 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	Total Est Hours	Total Est Cost
2	EM	Contract Manager Nicole Becnel	\$270	29	\$7,830
1	LPM	Project Principal Charlie Leadbetter	\$215	232	\$49,880
4	GPM	Co-Product Manager Julie Sullivan	\$175	696	\$121,800
4	GPM	Co-Product Manager Warren Graver	\$175	1,353	\$236,775
4	GPM	Co-Product Manager Danni Ricks	\$175	3,770	\$659,750
5	SS	Business Analyst Andrew Oliver	\$80	1,740	\$139,200
5	SS	Staff Support Erica Hoffman	\$80	1,740	\$139,200
5	SS	Editing/QA Mary Corley	\$80	30.4	\$2,432
5	SS	Editing/QA Carolyn del Vecchio	\$80	30.4	\$2,432
5	SS	Editing/QA Christine Fisher	\$80	30.4	\$2,432
5	SS	Editing/QA Karla Fossett	\$80	30.4	\$2,432
5	SS	Editing/QA Carole Ann Guay	\$80	30.4	\$2,432
5	SS	Editing/QA Molly Hawkinson	\$80	30.4	\$2,432
5	SS	Editing/QA Kyle Melton	\$80	30.4	\$2,432
5	SS	Editing/QA Bethany Pike	\$80	30.4	\$2,432

CL Year 1	Role	Project Resources	Rate	Total Est Hours	Total Est Cost
5	SS	Editing/QA Jordan Ramsey	\$80	30.4	\$2,432
5	SS	Editing/QA Jon Williams	\$80	30.4	\$2,432
5	SS	Editing/QA Caitlin Cabral	\$80	30	\$2,400
Total				9,894	\$1,381,155

Table 3 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	Estimated Hours Per Month
1	1	8	200	132	341
2	1	8	200	132	341
3	1	8	200	132	341
4	1	8	200	132	341
5	1	8	200	132	341
6	1	8	200	133	342
7	1	8	200	133	342
8	1	8	200	134	343
9	1	8	200	134	343
10	1	8	200	131	340
11	1	8	201	131	341
12	1	8	201	131	341
13	1	8	201	131	341
14	1	8	201	131	341
15	1	8	201	131	341
16	1	8	201	131	341
17	1	8	201	131	341
18	1	8	201	131	341
19	1	8	201	131	341
20	1	8	201	131	341
21	1	8	201	131	341
22	1	8	201	131	341

Month	EM Hours	LPM Hours	GPM Hours	SS Hours	Estimated Hours Per Month
23	1	8	201	131	341
24	1	8	201	131	341
25	1	8	201	131	341
26	1	8	201	131	341
27	1	8	201	131	341
28	1	8	201	131	341
29	1	8	201	131	341
Total	29	232	5,819	3,814	9,894

4.0 High-Level Timeline

The following figure illustrates the proposed high-level timeline by task and month.

Table 4: Proposed High-Level Timeline by Task and Month

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29
1.0 Project Management/ Annual Updates																													
2.0 XRUG Product Management																													
3.0 M&E Contractor Contract Management																													
4.0 Advance Planning Document (APD) Support																													
5.0 CCB Process Management																													
6.0 Knowledge Management																													

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29
and Collaboration																													
7.0 M&E Contractor Re- Procurement Support																													
8.0 Project Closeout/ Transition																													

BerryDunn Authorized Signature

As a principal of this firm in our Government Consulting Group, I have reviewed this SOW and am legally authorized to commit BerryDunn to the work as described herein. The work and level of effort is a not-to-exceed cost. Work to be invoiced to the Department of Health and Human Resources (DHHR) will be for actual hours expended, which might or might not equal the projected level of effort, but will not exceed the projected level of effort.

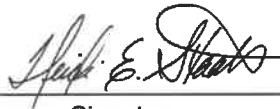


February 3, 2022

Signature

Date

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



February 4, 2022

Signature

Date

Ok



5.0 Resumes

Nicole Becnel, PMP®

Proposed Project Role:	Engagement Manager, Contract Manager
Role at BerryDunn:	Principal (employed with BerryDunn since 06/2010)
Years of Experience Relevant to Proposed Role:	17 years
Certifications and Education:	BA, Speech and Hearing Science, University of South Florida Certified Project Management Professional

Overview

Nicole brings valuable expertise in her field as an experienced Medicaid IT professional with over 15 years of 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 Bureau for Medical Services (BMS).**
 - *West Virginia Portfolio Manager (09/2013 to present).*
In her role as portfolio manager, Nicole provides portfolio management for multiple projects with BMS, including project management of ACA planning, analysis, and advisory services; MMIS, DW/DSS procurement, and project management; E&E systems planning; MITA 3.0 SS-A; and other related initiatives.
 - *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.

- **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 (now Molina) MMIS Operations (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®

Proposed Project Role:	Project Principal, Lead Project Manager
Role at BerryDunn:	Principal (employed full-time with BerryDunn since 1993)
Years of Experience Relevant to Proposed Role:	26 years
Certifications and Education:	BS, Computer Science and Economics, University of Maine Orono Certified Project Management Professional

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 26 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.

- **West Virginia Department of Health and Human Resources (DHHR) (2016 to present)** Charlie is and has served as project principal for several WV DHHR projects including:
 - Child Welfare Family First Assessment
 - Income Maintenance Manual (IMM) Update Project
 - Eligibility and Enrollment System RFP Development
 - Medicaid Benefit Plan Redesign Project
- **Indiana State Department of Health Maternal and Child Health (MCH) – Data System Assessment (08/2019 to present).**
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.

- **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.
- **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.
- **North Carolina Office of the State Auditor – *Independent Audit of the State IT Services Enterprise Project Management Office (EPMO) (04/2007 to 06/2007)*.**
Charlie conducted an independent evaluation of IT projects managed by the EPMO to determine whether the EPMO's policies, procedures, and practices were significantly improving the likelihood that a given project would be brought in on time and on budget. This involved evaluating a sampling of 12 enterprise IT projects managed by the EPMO, including NC FAST (Families Accessing Services through Technologies), a program designed to improve the way North Carolina Department of Health and Human Services (DHHS) and county departments of social services do business.
- **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®, Prosci® CCP

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

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 partnerships, 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, Certifications, Awards

MBA and MPH, University of Illinois at Chicago

BA, History, Northwestern University

Prosci® Certified Change Management Practitioner

PMI Certified Project Management Professional®

Maine Public Health Association Presidents' Award

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

Maine Public Health Work Group/Statewide Coordinating Council

Warren Graver, MBA, MSM, CSM

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant (employed with BerryDunn since 05/2020)
Years of Experience Relevant to Proposed Role:	15 years
Certifications and Education:	MISM, Information Systems Management, Keller Graduate School of Management MBA, Management, Howard University BBA, Marketing, Howard University Certified Scrum Master, Scrum Alliance

Overview

Warren is a senior consultant in BerryDunn's Government Consulting Group with extensive experience working with local, state and the federal government. Warren has served in the capacity of functional consultant, implementation manager, project manager, and release manager in a variety of IT driven project environments. He brings expertise in business transformation, requirements gathering, client relationship management, and business analysis. Warren is passionate about children services, and has led Title IV-E, child protective services, and child care co-payment engagements.

Relevant Experience

BerryDunn (05/2020 to present). Warren works with state government clients on public health systems, and programs.

- **West Virginia Department of Health and Human Resources (DHHR)**
 - *WIC Crossroads User Group Product Management Office (05/2020 to present).* Warren serves as the Co-Product Manager for the XRUG Product Management Office (PMO); managing key project deliverables, the communication between stakeholders of the consortium, including the M&E vendor.

Deloitte Consulting, LLP, Boston, MA (2017 to 2019). As a Senior Consultant with Deloitte's public sector practice, Warren led states through system replacement, and IT modernization projects, including the following:

- **Delaware Department of Social Services.** As a functional lead, Warren served as the point of contact between the client, testing and development teams. He co-developed testing plans, and worked with end users in resolving blockages that occurred during user acceptance testing. He analyzed overall test results, identified anomalies (instances where copays unusually increased), and performed project close-out responsibilities.
- **New Hampshire Department of Health and Human Services.** As a functional consultant, Warren participated in the reengineering of the intake and referral process

for the state's child protection services. He analyzed the state's legacy application, data model, and performed crosswalk/ fit-gap analysis to targeted application. Warren also facilitated requirements gathering sessions with managers and caseworkers; identified pain points.

- **Rhode Island Department of Human Services.** As a release manager, Warren managed all scheduled releases and collaborated with stakeholders to secure state approval for off-cycle (hot fix) releases. He led the ticket prioritization meetings between the state and Deloitte leadership; culminated in the identification of impactful fixes that would stabilize the enrollment eligibility application. Warren also coordinated the tracking of defects prior to releases with functional teams, ensuring proper issue resolution.

Public Consulting Group (05/2016 to 11/2016). As a delivery manager, Warren led the internal Comprehensive Child Welfare Information System (CCWIS) business development initiatives for the Human Services practice. His functions entailed conducting research on the CCWIS regulations, and understanding states' existing child welfare technologies.

WellSky Corporation (06/2013 to 05/2016). As a project and implementation manager, Warren led implementation teams within a technical environment, providing start-to-finish implementation and application of configurable case and financial management social services COTS solution; catering to Children Services Act, HCBS, SNAP, TAN-F, and Title IV-E funded programs. He captured requirements via by facilitating end user workshops, desk audits, JAM sessions, and user stories.

Rigil Corporation (03/2010 to 03/2012). As a strategy consultant, Warren collaborated with the CIO and executive leadership of the Air Traffic Organization IT in the development of IT strategy maps, and a business alignment roadmap. He led IT transformation and change management efforts; transitioning the organization from siloed business units, to a shared services platform.

Accenture (10/2007 to 07/2009). As service line expert for information management, Warren managed global operational reporting; understood all delivery center network's service capabilities, culture, and capacity; rationalized performance scorecards, KPIs, and mitigated data inconsistencies. He created a business intelligence and spend analytics dashboard for all global procurement transactions.

Danni Ricks, Prosci® CCP

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant (employed full-time with BerryDunn since 11/2018)
Years of Experience Relevant to Proposed Role:	3 years
Certifications and Education:	Prosci® Certified Change Management Practitioner MLC Certified Medicaid Professional (MCMP-II) Coursework at Virginia Tech in Human Services & Education WV Infant and Toddler Specialist (WVIT Certification) West Virginia University, Regents, BA with Minors in Health Promotion, Professional Writing/Editing, and Healthcare Data Analytics. (Expected 2023)

Overview

Danni is a consultant in BerryDunn's State Practice Area, focusing on public health. She is a certified Prosci® Change Management Professional and Medicaid Learning Center (MLC) Certified Medicaid Professional (MCMP-II). She is experienced in project coordination, vendor management, and process mapping and redesign. She is experienced in Request for Proposal (RFP) and requirements development, and well-versed in meeting and workgroup organization.

Relevant Experience

BerryDunn (11/2018 to present). As a staff consultant, Danni is responsible for project coordination, which includes client outreach, scheduling, facilitation of meetings, note taking, document review, research, and business analysis.

- **West Virginia Bureau for Public Health (BPH)**
 - *WIC Crossroads User Group Product Management Office (06/2020 to present)*
Danni manages the PMO's numerous meetings, document reviews, and change control processes.
 - *HIV and Hepatitis Process Redesign Project (03/2020 to 06/2020).*
Danni supports this project with business analysis and project coordination tasks.
 - *Strategic Map Implementation Support & Performance Management and Quality Improvement Plan Development Project (2/2020 to present).*
Danni supports this project with business analysis and project coordination tasks.

- *Emergency Medical Services Data Procurement Support (01/2020 to 10/2020).*
Danni supports the EMS Data project with business analysis and project coordination tasks.
- *Electronic Vital Records System Implementation (01/2020 to 08/2020).*
Danni supports the EVRS Implementation project with business analysis and project coordination tasks.
- **West Virginia Department of Health and Human Resources (DHHR) – Child Welfare Initiatives Project Management Services (02/2020 to present).**
Danni is responsible for project coordination for the Families First implementation support project.
- **West Virginia Bureau for Medical Services (BMS)**
 - *1915(c) Children with Serious Emotional Disturbance Waiver Development Project (11/2018 to 04/2020).*
Danni supported the 1915(c) Waiver project with business analysis and management tasks.
 - *West Virginia Enterprise Project Management Office (EPMO) (11/2018 to 04/2020).*
Danni supported the WV EPMO project with business analysis, project coordination, and management tasks.
 - *Substance Use Disorder (SUD) Waiver Initiative Project (09/2019 to 02/2020).*
Danni supported the SUD Waiver project with business analysis and management tasks.

Ghareeb Dental Group (03/2018 to 12/2018). As the front office coordinator, Danni is responsible for the office's client-facing office activities. This includes verifying insurance information, processing payments, and presenting treatment estimates to patients.

I-77 Auto Group (07/2014 to 10/2015). Danni provided executive assistance to the owner and office manager of I-77, serving as a title clerk. She processed DMV paperwork, provided accounting support, and processed vehicle purchases.

International Coal Group (04/2007 to 03/2008). As the IT services coordinator, Danni provided executive assistance to IT executives, assisted in troubleshooting IT HelpDesk calls, coordinated Help Desk assignments, and assisted with billing and website design and maintenance.

Charleston Area Alliance (09/2004 to 01/2007). Danni was a project administrator, responsible for event and trade show planning and coordination, performing research, reception, administrative functions, assisting with membership services, scheduling meetings, assisting with community development projects, and assisting with riverfront development and historical preservation projects. From September 2004 to February 2005, Danni worked with the Charleston Area Alliance through Manpower Temporary Services.

DANSCO (04/1998 to 07/2003). Danni started as a receptionist, then moved up to become the office manager and finally the owner of this family real estate, auctioneering, and promotional products business. The business was sold in 2003.

Andrew Oliver, MS

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant (employed 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.

Maine Department of Health and Human Services (2019 to 06/2021). As Data Analyst 2, Andrew served as the lead data coordinator for the Office of Child and Family Services (OCFS), Child Welfare Service and Early Childhood Education systems. 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 – customer intelligence, Andrew served as the Voice of the Customer lead and liaison to the network services, patient and population health services, and social media teams. 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 Jive-based 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

Erica Hoffman, MS

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Project Coordinator (with BerryDunn since 06/2021)
Years of Experience Relevant to Proposed Role:	7 years
Certifications and Education:	Masters of Science in Sports Studies, West Virginia State University Bachelor's Board of Regents, West Virginia State University

Overview

Erica is a project coordinator for BerryDunn's State Government Practice Group. 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 (07/2021 to present). As Project Coordinator, Erica is responsible for managing the meetings logistics and documentation for all client and vendor communications, which includes client outreach, scheduling, co-facilitation of meetings, note taking, document review, research, and business analysis. In addition, Erica provides insights and feedback for continuous improvements and quality management.

Mountaineer Montessori School (July 2019 to May 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 (February 2010 to July 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 (January 2001 to October 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.

Mary Corley

Proposed Project Role:	Staff Support/EQA
Role at BerryDunn:	Proposal Writer (employed 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:	Project Management Support
Role at BerryDunn:	Staff Writer with BerryDunn since October 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 seasoned 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.

Christine Fisher

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Staff Writer with BerryDunn since October 2020
Years of Experience Relevant to Proposed Role:	8 years
Certifications and Education:	Bachelor of Arts in Journalism, Temple University

Overview

Christine is a detail-oriented writer and editor with experience writing for public-sector audiences. She has extensive experience in editorial roles, including proposal writer, reporter, editor, and content marketing writer.

Experience

Proposal Writer, BerryDunn (October 2020 to Present). Christine serves as a proposal writer on BerryDunn's Business Development team. She specializes in responding to the needs of city and county governments, and she manages all aspects of proposal development, including writing, editing, research, strategy, and management.

News Writer, Engadget.com (February 2018 to October 2020). Christine wrote daily news stories for the Verizon Media technology news website Engadget.com. She produced four to seven stories daily on topics ranging from technology to science, space, and current events. She worked with a team of writers and editors to determine which news stories to follow, edit copy, and finalize headlines.

Freelance Writer (July 2014 to October 2020). Christine has worked as a freelance news writer, content market, and social media manager for numerous clients. She has written about everything from aerospace engineering (*Aerospace America*) to product development (Bresslergroup), health and wellness (*The Sunrise Guide*), and more.

Staff Writer, TrueLine Publishing (September 2016 – September 2017). Christine developed content for several publications under the TrueLine Publishing brand. These included B2B journals focused on technology, law, business, and construction. Christine developed five, 1,000-word profiles each week of companies, executives, and corporate projects.

Assistant Editor, Page Street Publishing (July 2014 – June 2015). Christine coached authors through the book development process. She provided manuscript development, copyediting, and proofreading.

Reporter, PlanPhilly.com (September 2012 – July 2014). As a news reporter for PlanPhilly.com, Christine developed and managed the transportation beat. She wrote news stories related to transportation infrastructure, planning, and policy within the City of Philadelphia. Topics included public transit, state and federal highway projects, bicycle and pedestrian initiatives and more. She provided additional support by reporting on a range of community news events.

Karla Fossett, MFA, Prosci® CCP

Proposed Project Role:	Staff Support/EQA
Role at BerryDunn:	Senior Content Administrator (employed full-time 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 Government Consulting Group 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 Government Consulting Group (11/2012 to Present). Karla serves in multiple roles for BerryDunn's Government Consulting Group, primarily in support of the New 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:	Staff Support/EQA
Role at BerryDunn:	Project Coordinator (employed 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:	Staff Support/EQA
Role at BerryDunn:	Staff Editor (employed 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:	Staff Support/EQA
Role at BerryDunn:	Staff Editor (employed part-time 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 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.

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.

Conveo (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:	Staff Support/EQA
Role at BerryDunn:	Project Coordinator (employed full-time with BerryDunn since 07/2012)
Years of Experience Relevant to Proposed Role:	17 years

Overview

Bethany is a project coordinator in our Government Consulting Group, 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:	Staff Support/EQA
Role at BerryDunn:	Staff Editor (employed 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:	Staff Support/EQA
Role at BerryDunn:	Staff (employed part-time 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.

Caitlin Cabral

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Editor with BerryDunn since September 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 EQA 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

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.

6.0 Deliverable Dictionary

Table 5: Deliverable Dictionary

Deliverable #	Deliverable Name	Deliverable Description
01	Annual Strategic Planning Meeting	Meeting inclusive of representatives from key stakeholder groups such as the Executive Steering Committee (ESC), CCB, and M&E contractor, as appropriate. Topics may include introducing new team members; clarifying the project goals and objectives for the coming year; discussing communication protocols; reviewing high-level project milestones; and identifying project risks, including the documentation of existing risks from previous years.
02	XRUG Annual Product Management Plan Revisions/Updates	Outlines how the project will be managed, executed, and controlled. The PMP will be designed to be referred to regularly and used as a tool to help the team achieve a successful outcome. The PMP will include details relating to management of project processes—in alignment with Project Management Institute (PMI) standards and the Project Management Body of Knowledge (PMBOK).
03	XRUG Annual Project Work Plan/Schedule Revisions/Updates	Provides the tasks, timelines, dependencies, task owners, and high-level milestones for the project. It is expected that the work plan/schedule will be progressively elaborated upon as the project progresses, i.e., detailed tasks and sub-tasks will be added and/or updated as new information is gathered and decisions are made.
04	Monthly XRUG PMO Status Report	Monthly PMO Status Reports to the ESC that contain updates on PMO and XRUG accomplishments and activities during the reporting period; PMO and XRUG planned activities for the following reporting period; key decisions, risks, and issues; and product schedules.
05	Annual State of XRUG Report	<ul style="list-style-type: none"> Assessment process to gather feedback from XRUG, including identifying participants, creating questions related to satisfaction with processes, and validating these with ESC Execute the assessment process and document all results Brief the XRUG and other interested SAs on the state of the XRUG and the Crossroads System at the Annual Meeting

Deliverable #	Deliverable Name	Deliverable Description
		<ul style="list-style-type: none"> Deliver a status report to the ESC based on discussion at the Annual Meeting detailing action plans to track progress
06	Annual XRUG Meeting	BerryDunn will identify meeting goals and content, create agendas, provide facilitation for sessions, generate meeting minutes as necessary, and coordinate invitations for the Annual XRUG Meeting.
07	Quarterly M&E Contractor Performance Report	Summary of information in an M&E Contractor Performance Report.
08	M&E APDs and Updates	BerryDunn will implement the APD process for the XRUG and coordinate activities regarding the APD inputs and requirements. We will facilitate the decision-making process and develop and update APDs
09	CCB Documentation	Ensuring documentation is available and current for CCB use, such as meeting agendas, issue-specific information, estimates, templates, meeting notes, action items, enhancement requests, change idea log, etc.
10	Issue Log	<p>BerryDunn's team will manage the issue-tracking process using an Issue Log per the agreed-upon processes in the Product Management Plan.</p> <ul style="list-style-type: none"> Ensuring known issues, enhancement requests, etc., with the Crossroads system are captured, documented, and tracked through resolution Providing information to stakeholders regarding status, workarounds, resources, risks, etc., relating to documented issues Providing basic guidance regarding the issue-tracking process for SA documentation
11	Cost Log	Maintaining documentation for all XRUG costs, including cost related to the CCP, in a Cost Log
12	Release Log	BerryDunn will monitor SA releases to production, including coordinating with SAs regarding the scheduling and status of each release to a production environment; maintaining a record log of which state implements each release by date, documenting issues, and coordinating with SAs regarding resolutions; and updating the M&E contractor and XRUG on status via email and weekly conference calls

Deliverable #	Deliverable Name	Deliverable Description
13	Meeting Agendas and Notes	BerryDunn will prepare and distribute agendas via email with the XRUG project lead's approval for each meeting by noon of the business day before the scheduled meeting. We will prepare and distribute approved meeting notes via email for review to appropriate staff within two business days of each meeting's completion. We will update notes within three business days of receiving feedback from SA staff.
14	Decision Documents	Inclusive of the item discussed, the decision made regarding how to address the item, the date the decision was made, and who made the decision—within three business days of the meeting. In addition, in accordance with the agreed-upon decision management processes in the Product Management Plan we will maintain a consolidated decision log on the M&E collaboration site
15	Updated XRUG Documentation	BerryDunn will maintain and provide updates to XRUG documents. <ul style="list-style-type: none"> • XRUG Charter • CCP documentation • Communications Plan
16	XRUG M&E Collaboration Site	BerryDunn will manage and update the XRUG M&E collaboration site. We will maintain and update the site, including managing and controlling access to the site and managing content (such as status reports, meeting minutes, etc.). We will establish a content update process to help ensure information on the site is current. In the event BerryDunn is no longer serving as the PMO, section 8.3 contains language that addresses the transfer of documents to the new PMO, or XRUG.
17	Crossroads M&E Evaluation Materials	BerryDunn will oversee and facilitate the bidder evaluation process, including developing evaluation materials—such as training documents and an evaluation workbook—facilitating scoring meetings, and providing post-meeting summary scoring documentation.
18	Transition-Out Plan	BerryDunn will execute the Transition-Out Plan by providing transition support to the incoming PMO contractor to ensure uninterrupted service support to the XRUG and member SAs for 30 business days prior to the end of the contract.

Deliverable #	Deliverable Name	Deliverable Description
19	Project Completion Summary and Closeout Meeting	BerryDunn will prepare and submit a Project Completion Summary to document the work performed related to this SOW and provide the disposition of deliverables, action items, risks, issues, etc. We will conduct a project closeout meeting with key project stakeholders to review the summary and capture lessons learned.

7.0 Overview and Role Descriptions

Table 6, below, provides a description of the BerryDunn resources and their roles.

Name/ Role	Responsibilities
Contract Manager (EM) Nicole Becnel, PMP	As the contract manager, Nicole will have overall responsibility for BerryDunn's contract. She will serve as point of contact for all contractual issues. She will be available to meet with the State project sponsor(s) and XRUG ESC if requested in order to address any contractual concerns.
Project Principal (LPM) Charlie Leadbetter, PMP	In the role of project principal Charlie will oversee the work performed by BerryDunn's PMO team and provide strategic direction to the engagement and product managers. He will partner with the contract manager and co-product managers to ensure the full commitment of BerryDunn to this engagement. He will be responsible for invoicing the State for PMO resources. He will be available to meet with the State project sponsor(s) and XRUG ESC regarding the project status or any other issues critical to the success of the project.
Engagement Manager (GPM) Julie Sullivan, PMP	In the role of engagement manager Julie will oversee the project team and serve as an escalation point for the State project sponsor(s). She will assure quality deliverables, client satisfaction, and assist in the mitigation of risks and issues. Julie will serve as a liaison between the product managers and the project principal and contract manager. She will also help ensure that the project schedule is being adhered to and the product management plan and project work plan are being followed.
Co-Product Managers (Co-PM) Warren Graver Danni Ricks	The co-product managers (Co-PM) will have responsibility for overseeing the work of the team, managing all day-to-day activities, monitoring progress against the agreed-upon PMP and schedule, contributing to and reviewing all BerryDunn deliverables prior to their submission to the ESC, and communicating project status to BerryDunn's project principal. The Co-PMs will serve as the primary point of contact for the XRUG. They will maintain the project work plan and schedule; facilitate meetings; lead fact-finding activities; and present critical project information to the ESC and XRUG as a whole.
PMO Business Analyst Andrew Oliver Erica Hoffman	The PMO BAs will provide support to the product manager, the ESC, and other project team members. The PMO Coordinator will draft deliverables, capture meeting notes, and provide general support to the team as required. The PMO BA will also be responsible for scheduling XRUG meetings; coordinating agendas; taking and circulating meeting notes; consolidating information produced through the project team into organized documentation in the form of product management artifacts (e.g., project charter, project status report, product management plan

Name/ Role	Responsibilities
	components, meeting minutes) but may also include supporting other functional areas of the project.
Editing/QA	The role of Editing/QA in the project is to ensure that deliverables and other documents are of the highest quality in terms of grammar, format, standardization, etc.

8.0 Federal Procurement Clauses



United States Department of Agriculture

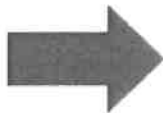
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A11. Federal Procurement Clauses

A11.1 Equal Employment Opportunity

Except as otherwise provided under 41 CFR Part 60, all contracts that meet the definition of federally assisted construction contract in 41 CFR Part 60-1.3 must include the equal opportunity clause provided under 41 CFR 60-1.4(b), in accordance with Executive Order 11246, "Equal Employment Opportunity" (30 FR 12319, 12935, 3 CFR Part, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and implementing regulations at 41 CFR part 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor." (2 CFR 200, Subpart F, Appendix II)

The EEO clause must be included or the State must have its own EEO similar clause.



See the [Department of Labor Executive Order 11246 – Equal Employment Opportunity](#) for more information.

A11.2 Clean Air and Federal Water Pollution Control Act

Clean Air Act (42 U.S.C. 7401-7671q.) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387), as amended. Contracts and subgrants of amounts in excess of \$150,000 must contain a provision that requires the non-Federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA). (2 CFR 200, Subpart F, Appendix II)

A11.3 Anti-Lobbying Act

This Act prohibits the recipients of Federal contracts, grants, and loans from using appropriated funds for lobbying the Executive or Legislative branches of the Federal government in connection with a specific contract, grant, or loan. As required by Section 1352, Title 31 of the U.S. Code and implemented at 2 CFR 200, Subpart F, Appendix II, for persons entering into a grant or cooperative agreement over \$100,000, as defined at 31 U.S.C. 1352, the applicant certifies that:

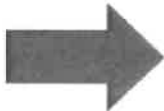


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- a. No federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with the making of any federal grant, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any federal grant or cooperative agreement;
- b. If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with this federal grant or cooperative agreement, the undersigned shall complete and submit Standard Form – LLL, “Disclosure Form to Report Lobbying,” in accordance with its instructions;
- c. The undersigned shall require that the language of this certification be include in the award documents for all sub-awards at all tiers (including sub-grants, contracts under grants and cooperative agreements, and subcontracts) and that all sub-recipients shall certify and disclose accordingly.

A11.4 Americans with Disabilities Act



See the [Americans with Disabilities Act website](#) for more information.

This Act (28 CFR Part 35, Title II, Subtitle A) prohibits discrimination on the basis of disability in all services, programs, and activities provided to the public and State and local governments, except public transportation services.

A11.5 Drug-Free Workplace Statement

The Federal government implemented 41 U.S. Code § 8103, Drug-free workplace requirements for Federal grant recipients in an attempt to address the problems of drug abuse on the job. It is a fact that employees who use drugs have less productivity, a lower quality of work, and a higher absenteeism, and are more likely to misappropriate funds or services. From this perspective, the drug abuser may endanger other employees, the public at large, or themselves. Damage to property, whether owned by this entity or not, could result from drug abuse on the job. All these actions might undermine public confidence in the services this entity provides.



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Therefore, in order to remain a responsible source for government contracts, the following guidelines have been adopted:

1. The unlawful manufacture, distribution, dispensation, possession or use of a controlled substance is prohibited in the work place.
2. Violators may be terminated or requested to seek counseling from an approved rehabilitation service.
3. Employees must notify their employer of any conviction of a criminal drug statute no later than five days after such conviction.
4. Contractors of federal agencies are required to certify that they will provide drug-free workplaces for their employees.

Transactions subject to the suspension/debarment rules (covered transactions) include grants, subgrants, cooperative agreements, and prime contracts under such awards. Subcontracts are not included.

A11.6 Royalty Free Rights to Use Software or Documentation Developed

2 CFR 200.315 Intangible property.

(a) Title to intangible property (see §200.59 Intangible property) acquired under a Federal award vests upon acquisition in the non-Federal entity. The non-Federal entity must use that property for the originally-authorized purpose, and must not encumber the property without approval of the Federal awarding agency. When no longer needed for the originally authorized purpose, disposition of the intangible property must occur in accordance with the provisions in §200.313 Equipment paragraph (e).

(b) The non-Federal entity may copyright any work that is subject to copyright and was developed, or for which ownership was acquired, under a Federal award. The Federal awarding agency reserves a royalty-free, nonexclusive and irrevocable right to reproduce, publish, or otherwise use the work for Federal purposes, and to authorize others to do so.

(c) The non-Federal entity is subject to applicable regulations governing patents and inventions, including government wide regulations issued by the Department of Commerce at 37 CFR Part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Awards, Contracts and Cooperative Agreements."

(d) The Federal Government has the right to:

- (1) Obtain, reproduce, publish, or otherwise use the data produced under a Federal award; and



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(2) Authorize others to receive, reproduce, publish, or otherwise use such data for Federal purposes.

A11.7 Debarment and Suspension

Debarment and Suspension (Executive Orders 12549 and 12689)—A contract award (see 2 CFR 180.220) must not be made to parties listed on the government wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR part 1986 Comp., p. 189) and 12689 (3 CFR part 1989 Comp., p. 235), "Debarment and Suspension." SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549. (2 CFR 200, Subpart F, Appendix II)

States to include in RFP and Contract a statement of certification by the vendor, such as "By signing this contract, the vendor certifies it is not suspended or debarred as specified by these rules."

Crossroads User Group

Product Management Office

Implementation Advance Planning Document Update (IAPDU)

Federal Fiscal Year 2022

Version 1.1

Revision History

Date	Version	Description	Author
07/12/2021	1.0	Draft: Funding Request	PMO: Warren Graver
10/15/2021	1.1	Final Draft	PMO: Danni Ricks / Warren Graver

CROSSROADS USER GROUP IMPLEMENTATION ADVANCE PLANNING DOCUMENT UPDATE

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1 ACRONYMS

Alabama	AL
Advance Planning Document(s)	APD
Bureau for Public Health	BPH
Change Control Board	CCB
Change Control Process	CCP
Communications Plan	CP
Crossroads	XR
Crossroads User Group	XRUG
Designated Governing Board	DGB
Executive Steering Committee	ESC
Federal Financial Participation	FFP
Food and Nutrition Services	FNS
Implementation Advanced Planning Document Update	IAPDU
Maintenance and Enhancement	M&E
Management Information System	MIS
North Carolina	NC
Office of Management Information Services	OMIS
Office of Nutrition Services	ONS
Product Director	PD
Product Management Office	PMO
Product Manager	PM
Rhode Island	RI
Service Level Agreement(s)	SLA(s)
Special Supplemental Nutrition Program for Women, Infants, and Children	WIC
State Agency(ies)	SA(s)
State Agency Model	SAM
Statement of Work	SOW
Task Force(s)	TF
Technical Advisory Group	TAG
United States Department of Agriculture	USDA
User Acceptance Testing	UAT
Virginia	VA
West Virginia	WV
West Virginia Department of Health and Human Resources	WVDHHR

2 EXECUTIVE SUMMARY

Crossroads is a State Agency Model (SAM) launched to develop a WIC Management Information System (MIS). The Crossroads MIS solution was developed for the following State Agencies (SAs): Alabama (AL), North Carolina (NC), Virginia (VA), and West Virginia (WV). These four states founded the Crossroads Consortium with the primary goal to work for the good of all SAs and for the good of all WIC Program recipients by maintaining the integrity of the Crossroads MIS and Source Code (System). Current membership (as of October 2020) in the Crossroads User Group (XRUG) includes these SAs: AL, Rhode Island (RI), VA, and WV. North Carolina (NC) pursued a separate contract for their MIS in 2017 and is no longer part of the XRUG.

This annual Implementation Advanced Planning Document Update (IAPDU) informs the United States Department of Agriculture (USDA) Food and Nutrition Service's (FNS) on the Product Management Office's (PMO) progress for the XRUG, including accomplishments, adjustments in plans or approaches, problems, and changes in budget or schedule. This IAPDU requests funding for WV as the product management contract state for the XRUG PMO.

3 WEST VIRGINIA OVERVIEW

The WV Department of Health and Human Resources (WVDHHR) Bureau for Public Health (BPH), Office of Nutrition Services (ONS), Special Supplemental Nutrition Program for Women, Infants, and Children (WIC) formally requests FNS approval to continue to contract for engagement oversight services from BerryDunn for PMO services and deliverables. The PMO Contract State who administers the PMO contract on behalf of the XRUG receives and disburses funds for the management of the PMO. The PMO Contract State completed the transition from VA to WV with an agreement that started on May 1, 2020, under the submission of the FFY2021 IAPDU. Recently, WV extended its master contract for project management services with BerryDunn. This ensures there will be no near-term interruption in service, as the contract is for three years with the option of three one-year renewals for a total of 6 years.

3.1 PRODUCT MANAGEMENT REQUIREMENTS FOR BERRYDUNN

The hierarchy established to support and coordinate the XRUG, and the System consists of the Contract State who has been designated by the XRUG, the Product Manager(s) (PM), the PMO, and the WV Product Director (PD). Product Management pertains to the Change Control Process of Crossroads, System communications and deliverables.

FFY 2022 will be the second full year of the PMO being within WV under the Contractor, BerryDunn. The PMO contract will be administered by WV on behalf of the XRUG. A PMO contract with a detailed Statement of Work (SOW) is provided in the Appendix, and WV will receive and disburse funds for the management of the PMO during the period covered by this IAPDU only for actual services and deliverables provided by the PMO Contractor, BerryDunn. The hours shown, and dollar amounts provided, in the SOW are for budgetary purposes, and only actual hours performed will be paid.

The PM serves as a liaison with the Maintenance and Enhancement (M&E) contract manager to oversee contract performance, and report at least quarterly to the XRUG measures of compliance to minimum standards. The PM serves as the primary point of contact for all System and product communications with USDA/FNS, XRUG Executive Steering Committee (ESC), VA M&E Contract Manager, and outside Contractors (EBT Providers, etc.). Product communications include all deliverables and schedules, with an expectation of timeliness and accuracy of deliverables. The WV PD oversees PMO performance based upon expectations and deliverables outlined in the SOW Appendix.

The duties of the PMO are detailed in the PMO SOW in accordance with the XRUG Charter document. At this stage in the life cycle of the System, and the strategic vision of the XRUG, the execution of the duties of the PMO are of paramount importance. Expectations and performance measures for PMO activities are prioritized as follows:

1. Under the direction of the PM, the PMO supports the SAs that are members of the XRUG, both voting and non-voting members, and facilitates the maintenance / enhancement of the Crossroads (XR) MIS and System.
2. Provide administrative and facilitation support to XRUG ESC, Designated Governing Board (DGB), Change Control Board (CCB), Technical Advisory Group (TAG), and Task Forces (TFs). For FFY 2022, the XRUG has identified the following areas requiring TF working sessions- Crossroads

breastfeeding functionality; Food Delivery Portal (TIP reporting migration to Salesforce); Participant Portal (document sharing); Crossroads interfacing with mobile apps, and Vendor Portal. Additionally, the complete implementation of the Cash Value Voucher Benefit increase remains a key system deliverable.

3. Adhere to the Change Control Process (CCP) through a thorough knowledge of the required controls for consistent handling of change requests. These controls allow business demands across all XRUG SAs to be balanced against the need to maintain existing levels of common functionality and prioritizes the use of available resources for change.
4. Support the CCB in the execution of the CCP.
5. Submit Service Orders on behalf of the XRUG to the M&E Contractor.
6. Share information with internal and external partners through conference calls, annual meetings, and documentation.
7. Participate with the M&E Contractor in System enhancements and defect resolution activities.
8. Conduct preliminary build verification testing [(smoke testing); this is a kind of software testing performed after the software build to ascertain that the critical functionalities of the program are working fine. It is executed “before” any details functional, or regression tests are conducted on the build] on major and minor releases as defined by the CCP prior to delivery to the SAs to determine viability of the release.
9. Coordinate User Acceptance Testing (UAT) with SAs.
10. Manage the document-sharing website and the Communications Plan (CP).
11. Prepare all M&E Advance Planning Documents (APDs) on behalf of the XRUG for approval by the ESC. Preparation of the PMO APDs is not the direct responsibility of the PMO; however, input and information from the PMO are required in order to develop the PMO APDs.
12. Serve as point of contact for SA transfer inquiries and coordinate the Alternatives Analysis documentation review by CCB.
13. The PM will direct the PMO in managing all System and product communications with USDA/FNS, ESC, and contractors, including all deliverables and schedules.
14. Submit prior approval requests for FNS, using Handbook 901 as a resource, APDs, test results, and updates as required.
15. Prepare and update at least annually the review of XRUG created governance and strategic documents (i.e., Charter, CP, Strategic Plan, Glossary, SLRs, Stakeholders, CCP, PWS, etc.).
16. Plan, coordinate, and facilitate the annual XRUG and annual Strategic Planning meetings.
17. Assist the XRUG in marketing the XRUG and XR system to other states in order to expand membership in the XRUG.
18. Assist the State Contract Administration Team and/or the lead XRUG state, in the quarterly assessment of the M&E Contractor.

3.2 ACCOMPLISHMENTS WITH BERRYDUNN

The official transition-in plan of the VA PMO moving to the WV PMO Contractor, BerryDunn, started on May 1, 2020. For the first two months, BerryDunn utilized that time to oversee the XRUG and gain knowledge on the inner-workings of the XRUG as they functioned under the VA PMO. During this transition in, BerryDunn also gathered all project artifacts (documents, reports, deliverable templates, etc.) from the VA PMO; attended all meetings taking place with the XRUG, VA PMO, FNS, and XRUG M&E Contractor; and participated in training opportunities provided by WV on the XR System. The transition-

in was completed on June 30, 2020, and the official start date for the full-time PMO with BerryDunn was July 1, 2020. Since the Transition-in, the PMO has assisted the XRUG in the development of stronger SLRs, updated the PWS, transitioned the monthly status report into a reader-friendly PowerPoint document, delivered meeting minutes and action items, established an XRUG repository, successfully transitioned the project lead role, navigated the M&E Contractor's replacement of their key personnel/ PM; and led overall discussions and mitigation strategies of risks to the XRUG.

During the FFY 2020, BerryDunn completed a review of a variety of documents and implemented several changes to the structure of certain elements of the XRUG. All conference calls for the XRUG were transitioned to Zoom to facilitate better discussions. XRUG documents were copied over from the VA document repository over to the XRUG SharePoint created and supported by BerryDunn. Agendas and meeting minutes for all conference calls are created and provided within 24 hours prior to a meeting start and within 48 hours of the meeting conclusion.

BerryDunn spent a considerable amount of time reviewing documentation created by the XRUG, including the Charter, Communication Plan, CCP, Strategic Plan, etc. to ensure alignment between all documents and to gain a broader understanding of both XR and the XRUG. Work continued to be done on all these documents in FFY 2021, and will continue in FFY 2022, to ensure they are current, up-to-date, and relevant to the XRUG.

In FFY 2021, BerryDunn virtually hosted the Annual User Group Meeting in November 2020 and May 2021; ensuring all partners were in attendance and had representation from all FNS XR partners. They facilitated both meetings over the course of three days and provided valuable insight to all partners on the goals and strategies to move the XR System into the future. The Annual Meeting held in May was as a result of the XRUG's decision to have the annual XRUG meeting earlier in the FY to ensure completion of certain documents, including the annual IAPD, prior to the start of each FY.

In addition, BerryDunn helped to facilitate the submission of the annual M&E IAPDU quickly into the start of FFY 2021 and received approval of the document in December 2020 (one of the earliest submissions the XRUG has ever had approval on). By getting this approval so quickly, each of the member SAs had more time to apply for the needed funds to help cover the maintenance portion of the XR contract that not all states have been able to participate in previously due to time constraints.

Finally, BerryDunn reviewed and provided needed feedback on a variety of aspects of the Performance Work Statement (PWS) that is an attachment of the RFP for the new XRUG M&E Contract that is being targeted for release early FFY 2022. The insight gained in reviewing the PWS and providing feedback as needed, will allow the XRUG to have a stronger contract with the M&E Contractor.

BerryDunn continues to provide regular updates to all XRUG members, including all FNS partners, as required on the monthly status reports. Any questions that arise from the reports, or other resources, are addressed promptly by BerryDunn and follow-up does occur to ensure tasks and related assignments are completed.

Additionally, the PMO was able to collaborate with the XRUG and accomplish the following during FFY 2021:

- Implementation of the Cash Value Voucher Benefit increase

- Production migration to v 2.4.2 (including CR3, CR4, CR10, CR70, CR64) allowing port changeability, moving away from being hard-coded
- VA and WV server upgrades
- TLS/ security upgrade
- Facilitated the scope development of Release 2.5
- Facilitated the Annual meeting in November 2020 and May 2021
- Maintained ongoing dialogues with Gainwell regarding RI's existing issues with reporting; upgrading their production environment to be in alignment with all states
- Provided a walk-through of the new SharePoint set-up

3.3 BERRYDUNN CONTINUED PLAN INTO FFY 2022

WV has continued to contract with BerryDunn for the provision of PMO services for the XRUG for continued results in several valuable propositions. Strategic goals for FFY 2022 are:

- To provide continued RFP support through evaluation, selection, and onboarding of the M&E Contractor;
- Development of a product roadmap and enhanced 5-year XRUG Strategic Plan.
- To facilitate state technical assistance within the UG (encouraging knowledge share with states having mature processes and experience).
- Ensuring contractor accountability and follow-up on technology upgrades (e.g., tracking sunset of IE11 support), and
- To support new marketing strategies to attract new XRUG Member States. No additional costs are added to the PMO budget to perform marketing efforts for the XRUG Member States.

The contract expenditures under the BerryDunn contract will be based on charged hourly rates with a pre-determined maximum number of hours. Unused hours will not be charged to WV under the contract. The contract also sets forth a specific set of deliverables geared towards ensuring efficient and effective operations of the System, the M&E Contractor, and the XRUG. BerryDunn's master contract with the State also contains service level agreements (SLAs) that allow WV to hold the PMO accountable.

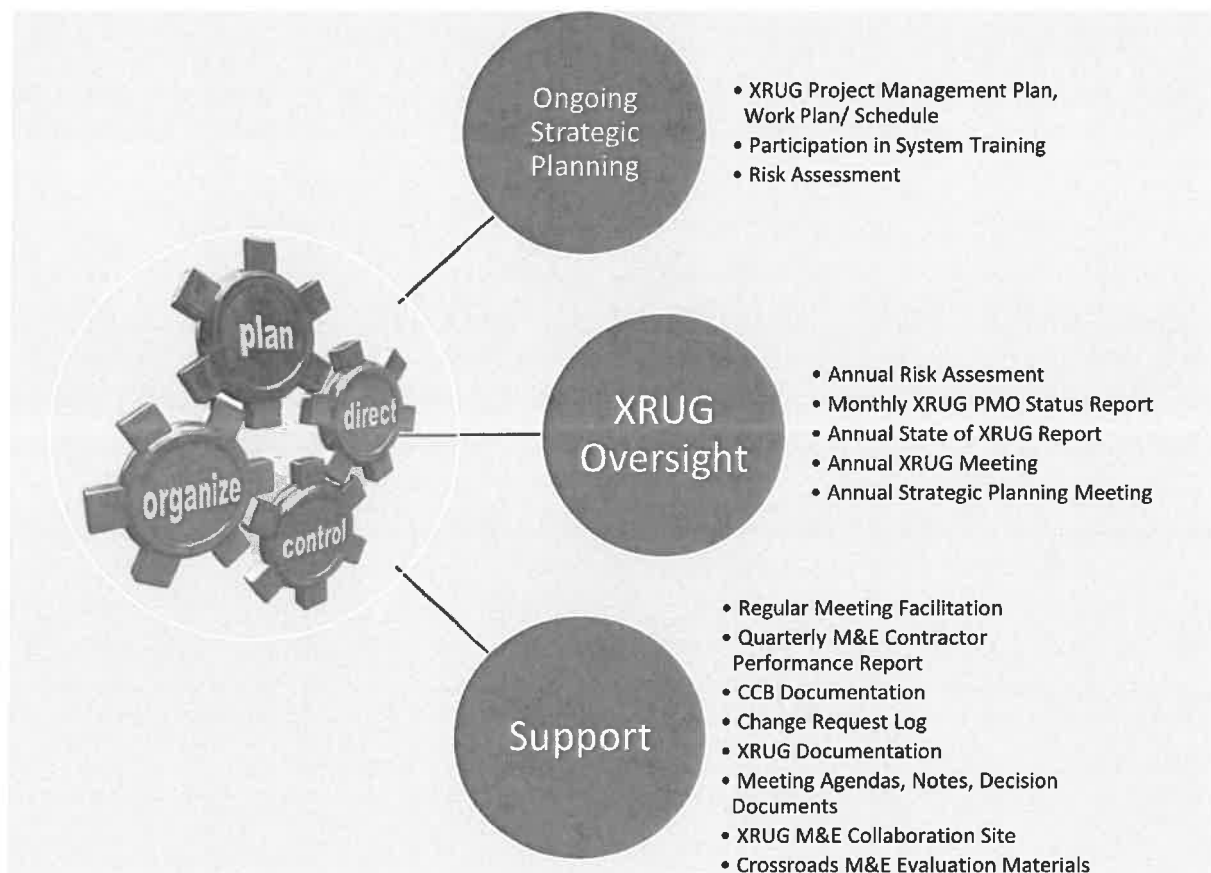
As outlined in CDO HHR_21_03, Project Management Services and MMIS Implementation Services document, BerryDunn provides "the management, planning, administering, controlling, tracking, and/or reporting of project management activities." WVDHHR holds the PMO accountable through the "Issuance of an approved Delivery Order," which receives oversight from WVDHHR ONS and WVDHHR Office of Management Information Services (OMIS).

BerryDunn's initial activities for the PMO, many of which occurred during the fourth quarter of FFY 2021, were focused on creating the organizational structure and expectations necessary for the PMO and XRUG to operate in a manner that will help ensure a well-functioning user group. The deliverables required within the first four months included: Project Kickoff Meeting, XRUG Project Management Plan, XRUG Project Work Plan/Schedule, XRUG Transition-In Plan, Risk Assessment, Participation in System Training,

and Clinic Observation. All these deliverables were completed within the timeframe given, except for Clinic Observations, which was put on hold now due to the lingering COVID-19 pandemic.

Lastly, the ongoing deliverables included in BerryDunn's SOW (Appendix A) will lead to sustainability of the XRUG and improved functionality of the System. While the contract names dedicated resources from BerryDunn to the PMO it also allows for greater flexibility in being able to add resources during times of greater demand, such as the quarterly system releases/builds. The scope includes deliverables that ensure XRUG activities are managed and documented with well-defined parameters leading to improved outcomes for the system and delivering services to WIC participants. These deliverables include Artifact Documentation, Knowledge Management and Sharing, Product Management, CCP, and hosting of prospective partner states, BerryDunn will assist the XRUG in sustaining the current offering and build a solid foundation for growth.

As the XRUG enters the final months of the current M&E contract, the PMO has begun developing a Business Contingency Plan. The primary focus of the Business Contingency plan is to identify the risks associated with not obtaining an extension, as well as the impact of not getting the RFP out in a reasonable timeframe.



3.4 WEST VIRGINIA BUDGET FOR FFY 2022

The intent of this budget is to help ensure a common understanding of expectations as they relate to the deliverables and services that will be provided for the ONS XRUG PMO funding.

BerryDunn, will operate under the attached SOW and will be inclusive of IT Services, Personnel, Training, Equipment, Supplies, and Incidentals. BerryDunn has estimated 3.75 Full-Time Employees on the PMO Contract, as detailed in the SOW. Actual hours will be charged to WV and any unused hours will not be charged. WV State Agency staff will not be working as PMO staff or doing PMO services or deliverables; therefore, none of those hours will be billable to the PMO budget or contract. The language provided in the SOW, "requests for additional funding" is standard contractual language, but WV is not required, or under any obligation, to provide additional funds should they be needed by BerryDunn under this contract.

The budget for FFY 2022 includes deliverables from BerryDunn: Updated Annual Product Management Plan, Updated Annual Project Work Plan/Schedule, Monthly XRUG PMO Status Reports, Quarterly M&E Contractor Performance Report, Annual State of XRUG Report, and Annual XRUG Meeting.

As the PMO Contract State, WV is requesting funding for the full FFY 2022 year as shown in the attached budget. Any costs associated with the BerryDunn PMO Contract over what is approved by FNS for use by the PMO, will be covered by already existing WV NSA funding. The funding needed for October 1, 2021, through September 30, 2024, is shown on separate SOWs; October 1, 2021, through April 30, 2022, is shown in the previous SOW submitted with FFY2021 IAPDU, and May 1, 2022 through September 30, 2024 are in the SOW provided as an attachment to this FFY 2021 IAPDU.

3.5 ANNUAL MEETING EXPECTATIONS

BerryDunn's SOW correctly lays out responsibility for the Annual Meeting logistics coordination, facilitate the actual meeting, discussion facilitation, and notetaking to preserve key decisions and dialogue as 100% BerryDunn staff. For participants who will not attend in person, logistics coordination includes access to Zoom or Microsoft Team meetings and sharing meeting materials electronically, as was accomplished in the most recent Annual Meeting held in May 2021. It is noted that BerryDunn is not responsible for costs of the SA staff to attend the Annual XRUG Meetings (e.g., hotels, travel, food, conference room rental, etc.), but will assist the host state in making those arrangements.

3.6 STATEMENT OF WORK OVERVIEW

The SOW was negotiated with BerryDunn based upon the User Group Governance Documents. The WV State Agency XR Project Coordinator, Assistant Director, and Director specified the requirements that the PMO must meet WV Office of Technology standards, confidentiality requirements, and adhere to industry standards (PMBOK). All these requirements were met by BerryDunn under a current master contract already held by WVDHHR. Since a contract already existed within WVDHHR for PMO services, ONS was required to utilize that contract and could not solicit independent proposals and quotes.

The original RFQ was awarded to BerryDunn via a master contract that was appropriately solicited with the state of WV Purchasing Division rules and regulations. This RFQ had specific terms, requirements, and qualifications that had to be met by any vendor submitting a bid proposal. Each vendor that submitted a bid proposal was evaluated equally to determine if they met each one of the specifications written, requirements listed, and to ensure they had the appropriate qualifications, including minimum number

of prior years' experience, references, and certifications. For any vendor that did not meet the specifications, etc. were noted in the bid evaluation and marked as "not meeting specs" and disqualified. All the bid proposals were evaluated based on specifications, etc., as well as, costs, and the low-bid vendor meeting all specifications was awarded the master contract. In this case, the winning vendor was BerryDunn. The contract was awarded as effective June 15, 2021, for an initial period of 3 years, with 3 one-year allowable renewals, and a 12-month reasonable time clause extension. BerryDunn was successful in their recent bid for the new master contract, which allows the master contract to be in place until May 2027 (providing all options years are utilized).

During negotiations regarding number of hours and the cost of the overall project, BerryDunn revised the hours lower to meet needed expectations and questions of the ESC, ONS, and OMIS. The completed SOW reflects the best and final offer for the WV PMO contract based on the rates already negotiated at the master contract level completed in 2021. Once the SOW was completed and agreed to by all of ESC, the ONS put in a delivery order contract for a 29-month term, knowing that the 17-month additional term could be utilized. Any addendums or additions, including the Federal Clauses, have been added to the BerryDunn SOW, which is part of the WV PMO contract.

The SOW encompasses the current IAPDU timeframe and the vision towards the next request to FNS. To meet the guidelines of WV procurement, the delivery order contract will be reviewed and extended to meet the needs of the XRUG through 9/30/2024 at which time a renewal of the master contract for PMO services will already be awarded by WVDHHR. The plan is for WV to procure the services of BerryDunn to meet the timeframes of the fiscal years, thus falling in line with all procurement, reporting, and funding periods.

The FNS requirements outlined in Handbook 901 align with the intent of the work by BerryDunn for the XRUG, in that the goal is to improve and standardize the PMO for sustainability and portability. As the requirements state, "The primary purpose of these policy requirements is financial stewardship of Federal financial participation (FFP) to ensure that federal funds are not used to pay repeatedly for the same functionality. Another purpose is to facilitate transfers of useful systems among States in support of the financial stewardship purpose. There are two major considerations affecting transferability: the right to transfer (i.e., ownership and licensing) and the ability to transfer (i.e., technological compatibility, interoperability, and portability). The useful system, here, would be a PMO with protocols, processes, and expectations which are clearly documented for future entities to take up and utilize seamlessly.

An annual Strategic Planning Meeting will be held with remote access via the Zoom Meeting Platform for all participants, inclusive of representatives from key stakeholder groups such as the ESC, CCB, PMO Contractor, and the M&E Contractor, as appropriate. Should COVID-19 restrictions be lifted by the date of the renewal Project Strategy Meeting, the on-site meeting will limit invitations to the WV SA representatives and the Co-PMs to employ social distancing.

The collaboration site is an enhanced Microsoft SharePoint platform hosted by BerryDunn, utilizing secure cloud architecture. Stakeholders from the SAs will be able to access the site and all documentation. Regular monthly and quarterly backup and archiving procedures will place the documentation on the WV WIC servers, guaranteeing ownership of the artifacts remains with the XRUG.

The archiving procedures will permit an eventual transition-out strategy to seamlessly move both from BerryDunn as contractor and WV as PMO Lead State to the next designated vendor and SA. These steps are further outlined in Section 4.2 of the XRUG Strategic Plan and Section 8.3 of the SOW.

4 ATTACHMENTS

Appendix A: West Virginia Contactor Statement of Work



STATE OF WEST VIRGINIA
DEPARTMENT OF HEALTH AND HUMAN RESOURCES
Bureau for Public Health
Office of Nutrition Services

Bill J. Crouch
Cabinet Secretary

Ayne Amjad, MD, MPH
Commissioner & State Health Officer

M E M O R A N D U M

TO: Bryan Rosen
Director of Purchasing, DHHR

THROUGH: Lesley Walizer
BPH, Central Finance, Purchasing Director

FROM: Heidi Staats *HCS*
Director of the Office of Nutrition Services

DATE: February 4, 2022

SUBJECT: BerryDunn Statement of Work – PMO Contract for the Crossroads WIC MIS

The purpose of this memorandum is to request approval for the Office of Nutrition Services (ONS) to contract with BerryDunn through a 29-month delivery order from CMA HHR21*3. A new delivery order is necessary to continue the execution of the Product Management Office (PMO) for the Crossroads WIC Management Information System (MIS) multi-state consortium. Funding for this initiative has been requested, and approved, through an Implementation Advanced Planning Document Update (IAPD-U).

Crossroads is one of three State Agency Model (SAM) systems launched nationwide in response to a federal mandate for combining efforts with multiple states to design, build, implement, and maintain WIC MIS systems for the administration of the WIC Program. The Crossroads Consortium, referred to as the Crossroads User Group (XRUG), was awarded federal funding, and contracted with Computer Sciences Corporation (CSC), in 2009 to build a SAM system for the states of Alabama (AL), North Carolina (NC), Virginia (VA) and West Virginia (WV). These four states fully implemented the Crossroads WIC MIS in 2014. The transition to system maintenance and enhancement occurred in 2017 with the XRUG membership of Alabama, Virginia, and West Virginia. In 2018, Rhode Island joined the XRUG, and fully implemented the Crossroads WIC MIS in 2020.

The PMO for the XRUG has experienced many transitions since the initiation of Crossroads. Under the Design, Development, and Implementation (DD&I) Contract, NC was the lead state, and contracted with a provider for PMO services. The PMO then transitioned to VA in January 2017 with the new Maintenance and Enhancement (M&E) Contract with CSC (later DXC MS LLC and currently Gainwell Technologies LLC), and NC's exit from the XRUG.

On May 1, 2020, under the delivery order ADO WIC2000000015, the XRUG PMO services transitioned from VA to WV. The ONS secured Project Management Contractor, BerryDunn using a current DHHR/Bureau for Medical Services contract. The transition to an independent PMO was suggested by USDA FNS to ensure the primary goal of the XRUG to work for the good of all WIC State Agencies plus product management of the change control process of Crossroads MIS communications and deliverables with Gainwell Technologies LLC.

The current CDO WIC21*002 BerryDunn WIC delivery order is expiring on April 30, 2022. At such time, the XRUG will not have a PMO to direct the services and activities for the Crossroads WIC MIS. Without a PMO, or lead state, to direct the Crossroads project the ONS and XRUG (AL, RI, VA, and WV) will be out of compliance with Federal Regulations set forth under the original purpose of the SAM project. Furthermore, the need for a PMO to direct and further the development, maintenance and enhancement of the Crossroads MIS is vital to the successful administration of the WIC Program for clinic and state agency operations in all four XRUG states. The Crossroads MIS is used in all four XRUG states to provide direct WIC services to eligible participants by capturing eligibility criteria, nutrition risk, referrals, and food benefit delivery. State Agency functions of vendor and farmer management, food funds management, caseload management, monitoring and audits are also conducted through Crossroads. Ultimately, the PMO of the XRUG ensures Gainwell Technologies LLC maintains and completes minor and major defect builds of the Crossroads MIS to meet the needs of the four states equally and maintains integrity of the system in all functional areas above which are required components of WIC Program administration per WIC regulations.

The current Department of Health and Human Resources master contract with BerryDunn (CMA HHR2100000003) is set to expire on June 14, 2024. The ONS wishes to establish a new delivery order with BerryDunn to start on May 1, 2022 (at the end of the current delivery order) and end on September 30, 2024. This new delivery order will extend past the expiration of the master contract to align with the federal fiscal year funding periods. The new delivery order shall encumber the funds for three federal fiscal years, but only 3 months beyond the DHHR master contract, but it does not in any way provide an extension of the master contract. BerryDunn has agreed to this new delivery order with a start date of May 1, 2022, through September 30, 2024, under all the terms, conditions, and pricing as established under the master contract even though this ONS delivery order will continue past the expiration of the master contract. Likewise, the United States Department of Agriculture (USDA) Food and Nutrition Services (FNS), has approved the Statement of Work (SOW) and the length of the service period through the IAPD-U process.

Allowing the execution of a new delivery order with BerryDunn will allow this contractor to continue the work of serving as the PMO for the XRUG based upon the attached Statement of Work. The May 1, 2022, delivery order with BerryDunn will be an independent, separate third-party contract with no employee overlap between the state of WV and BerryDunn contractors.

All projects under the WIC Program are 100% federally funded by the USDA FNS. The not-to-exceed cost of this PMO Project for 29 months through September 30, 2024, is \$1,381,155.00. The ONS will utilize WIC SAM Technology Funds and WIC Administrative Services Funds as outlined in the PMO IAPD-U. The PMO IAPD-U submitted to USDA, and approval

documentation, is attached for reference. The WIC SAM Technology funding for the XRUG PMO funding cannot be used towards any other WIC objectives except for the execution of the PMO contract with BerryDunn. If this funding is not utilized for this project, it reverts back to USDA as unspent.

Your expedited consideration of this request is appreciated. If you have questions or need additional information, please contact Heidi E. Staats, ONS Director, by phone at 304-558-0030 or by email at Heidi.E.Staats@wv.gov.

