



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: 04-15-2022

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

Order Number:	CDO 0511 2680 BMS2200000025 1	Procurement Folder:	1027202
Document Name:	MHP PMO and Procurement Assistance Project	Reason for Modification:	
Document Description:	MHP PMO and Procurement Assistance Project		
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: Kelly (Jimmy) Dowden Requestor Phone: (304) 356-4861 Requestor Email: jimmy.k.dowden@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
PROCUREMENT OFFICER: 304-352-4286 HEALTH AND HUMAN RESOURCES BUREAU FOR MEDICAL SERVICES 350 CAPITOL ST, RM 251 CHARLESTON WV 25301-3709 US	PROCUREMENT OFFICER: 304-352-4286 HEALTH AND HUMAN RESOURCES BUREAU FOR MEDICAL SERVICES 350 CAPITOL ST, RM 251 CHARLESTON WV 25301-3709 US

Total Order Amount: \$877,995.00

Purchasing Division's File Copy

ENTERED

CA 4/15/22
PURCHASING DIVISION AUTHORIZATION
SIGNED BY: Linda B Harper *Linda Harper*
DATE: 2022-04-12 4-20-22
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION
Beverly Toler
DATE: 4-21-2022
ELECTRONIC SIGNATURE ON FILE

Extended Description:

Mountain Health Promise Project Management and Procurement Assistance Project

Service Period: 05/01/2022-09/30/2023

Total Not-To-Exceed Cost: \$877,995.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$39,345.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-01	2023-09-30				

Commodity Line Description: Lead Project Manager: Base Year One**Extended Description:**

Lead Project Manager: Base Year One

Hourly Rate: \$215.00

Eduardo Daranyi: 183 Hours @ \$215.00=\$39,345.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$49,410.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-01	2023-09-30				

Commodity Line Description: Engagement Manager: Base Year One**Extended Description:**

Engagement Manager: Base Year One

Hourly Rate: \$270.00

Nicole Becnel: 183 Hours @ \$270.00=\$49,410.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$662,200.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-01	2023-09-30				

Commodity Line Description: General Project Manager: Base Year One**Extended Description:**

General Project Manager: Base Year One

Hourly Rate: \$175.00

Peter Alfrey: 622 Hours @ \$175.00=\$108,850.00
 Nicole Spears: 1,269 Hours @ \$175.00=\$222,075.00
 Tonya Roloson: 858 Hours @ \$175.00=\$150,150.00
 Brody McLellan: 260 Hours @ \$175.00=\$45,500.00
 Lisa Roberts: 520 Hours @ \$175.00=\$91,000.00
 Michelle Weaver: 255 Hours @ \$175.00=\$44,625.00

Total: 3,374 Hours @ \$175.00=\$662,200.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$127,040.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-01	2023-09-30				

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

Extended Description:

Project Management Support Staff: Base Year One

Hourly Rate: \$80.00

Jon Watkins: 1,169 Hours @ \$80.00=\$93,520.00

Jordan Ramsey, Molly Hawkinson, Caitlin Cabral, Janine DiLorenzo, Jonathan Williams, Emily Hendrickson: 419 Hours @ \$80.00=\$33,520.00

Total: 1,588 Hours @ \$80.00=\$127,040.00



March 28, 2022

To Whom It May Concern:

BerryDunn submitted a Staffing Plan and Scope of Work (SOW) document to assist the Bureau for Medical Services (BMS) by providing support for the Mountain Health Promise (MHP) Procurement Project under our contract (CMA # HHR21*03). As stated in the SOW document, the duration of this work is estimated to be 17 months. BerryDunn agrees to a SOW start date effective May 1, 2022.

Assuming a start date of May 1, 2022, the work would then conclude on September 30, 2023. BerryDunn will honor the current pricing, terms, and conditions included in the current approved Master Agreement for the duration of this CDO.

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

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

Best Regards,

A handwritten signature in black ink, appearing to read 'Eduardo G. Daranyi'.

Eduardo G. Daranyi
Principal
207-541-2244



**Staffing Plan and Scope of Work
For the Mountain Health Promise
Project Management and Procurement Assistance Project
Prepared for CMA #HHR21*03**



Submitted by:

Eduardo Daranyi, PMP®, Principal
Nicole Becnel, PMP®, Principal
Berry Dunn McNeil & Parker, LLC
300 Capitol Street
Charleston, WV 25301
Phone: 207-541-2244
edaranyi@berrydunn.com
nbecnel@berrydunn.com

Submitted on:

March 28, 2022

berrydunn.com



Staffing Plan and Scope of Work

For the Mountain Health Promise Project Management and Procurement Assistance Project

This scope of work (SOW) describes the tasks BerryDunn will perform to assist the West Virginia (State) Department of Health and Human Resources (DHHR) and Bureau for Medical Services (BMS) in the re-procurement of the Mountain Health Promise (MHP) managed care program. This SOW is henceforth referred to as the MHP Procurement SOW. This work will be completed in accordance with the terms and conditions of the base contract between BerryDunn and the State.

1.0 Key Information

This document intends to help ensure a common understanding of expectations relating to the deliverables and services BerryDunn will provide for the MHP Procurement Project.

The objective of this project is to assist DHHR with MHP, including:

- Engagement Oversight
- Project Initiation and Project Management Support
- Procurement Assistance
- Waiver Updates and Implementation, if needed
- Implementation Support
- Operations Transition Support
- Project Closeout

This project will aid the State in meeting several of its identified Medicaid Information Technology Architecture (MITA)-specific goals, such as:

- Gen 2.0 – Minimize risk and maximize value from contracted services and products
- Gen 3.0 – Leverage technology to enhance performance and decision-making
- Gen 4.0 – Assess, implement, and monitor compliance with all relevant federal laws and regulations (e.g., PPACA, HIPAA, etc.)
- Gen 5.0 – Ensure program quality
- OM 1.0 – Improve operational efficiency and reduce costs in the healthcare system
- ME 1.0 – Enhance the ability for members to participate in and exercise responsibility for their personal health choices.



- PL 1.0 – Enhance BMS’ ability to analyze the effectiveness of potential and existing benefits and policies
- PM 01 – Improve provider access to real-time data
- PL 2.0 – Improve consistency of Plan Management processes and effective communication of policy
- CM 1.0 – Improve healthcare outcomes for members

Estimates for this SOW are based on the following assumptions:

- 1) All project documents—including meeting outcomes, action items, issues, risks, and decisions—will be on the BerryDunn SharePoint site and will be brought to the attention of the DHHR project sponsor.
- 2) BerryDunn will provide deliverables in an agreed-upon format approved by the State.
- 3) To expedite the development of the MHP Request for Proposal (RFP), BerryDunn will review relevant documentation and meet with internal BerryDunn team members who have worked on past projects with DHHR to establish a baseline understanding of the current enterprise. The results of these conversations will be used to inform the baseline requirements for this effort. In addition, BerryDunn will request from the State pertinent documentation to understand the MHP-related work completed to date.
- 4) This SOW assumes that DHHR will release one RFP.
- 5) This SOW assumes that BerryDunn will be required to evaluate no more than five proposals during the procurement assistance phase.
- 6) This SOW assumes that tasks to be completed by external entities (including other State agencies and federal regulators) associated with the development, release, review, and scoring of the RFP can be completed within the durations established in the initial project timeline and schedule.
- 7) The State leadership team will consist of BMS Deputy Commissioner Fred Lewis as the DHHR project sponsor and BMS Managed Care Director Susan Hall as the DHHR project lead.
- 8) BerryDunn assumes that Joint Requirements Planning (JRP) sessions will occur for up to 12 consecutive weeks as the group works through updates to the existing RFP, as needed.
- 9) BerryDunn assumes that the relevant stakeholders from DHHR bureaus and agencies will be available to participate in project meetings and document reviews. If these individuals are not available or do not participate, the project schedule, scope, and cost may be impacted.
- 10) JRP sessions will consist of targeted conversations with State-identified attendees



regarding State and/or federal requirements. The outputs from these sessions will be used to validate and/or confirm that necessary State and/or federal requirements are reflected within the RFP.

- 11) This SOW assumes that the State project manager will provide timely decision-making and responses to information requests from the BerryDunn project team.
- 12) This SOW assumes prompt review and input from the State's Department of Purchasing. Any delays in reviewing contract documents (in this SOW or the contracts of potential vendors) may impact the overall timeline for the work that BerryDunn will complete under this contract.
- 13) The State intends to utilize the Medicaid Management Information System (MMIS) Implementation Advance Planning Document (IAPD) (formerly the MITA APD) for this SOW. The Centers for Medicare & Medicaid Services (CMS) has previously approved the MMIS IAPD on February 15, 2022, for total State and federal funds in the amount of \$56,989,025 under project identifier WV-2022-01-24-MMIS-MITA IAPD-U. The estimated cost of the services to be delivered under this SOW is \$877,995. Therefore, any additional scope added to the services to be provided under this SOW may require that the State update its MMIS IAPD to allocate additional funds for project management.
- 14) The BerryDunn leadership team will consist of Ed Daranyi and Nicole Becnel providing project oversight and Peter Alfrey providing managed care program oversight.
- 15) This work will begin upon approval of this SOW and a mutually agreed-upon date. This work is scheduled to begin on May 1, 2022, and is projected to continue for 17 months.



2.0 Project Scope and Staffing Plan

The table below describes the service approach, deliverables, and acceptance criteria for BerryDunn's work, identifies BerryDunn team members responsible for conducting our work, and lists the estimated hours to complete each key task. A high-level timeline for the activities described below is provided in Section 3.0.

Table 1: Project Deliverable/Service Approach, Responsibility, and Hours Estimate

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
1.0	Engagement Oversight <i>Service Approach</i> BerryDunn's leadership team will oversee and coordinate BerryDunn staff, services, and deliverables. BerryDunn's leadership team will regularly meet with the BerryDunn project lead and other key team members to discuss project status and issues affecting the timely completion of the project work and oversee BerryDunn staff, services, and quality assurance (QA) of deliverables. <i>Deliverable</i> <ul style="list-style-type: none">Deliverable 1: Commissioner Briefing <i>Completion Criteria</i> Engagement Oversight will be deemed complete upon signature acceptance of the Project Closeout Summary by the DHHR project sponsor or their designee.	Eduardo Daranyi Nicole Becnel Peter Alfrey Nicole Spears Jordan Ramsey Molly Hawkinson Caitlin Cabral Janine DiLorenzo Jonathan Williams Emily Hendrickson	520
2.0	Project Execution and Control <i>Service Approach</i> BerryDunn will host a project kickoff meeting and prepare a high-level project timeline upon project initiation. In support of ongoing project management, BerryDunn's leadership will regularly meet with the project sponsor to discuss project status and issues impacting the timely completion of the work and oversee BerryDunn staff, services, and deliverables. Project management support will also include: <ul style="list-style-type: none">Meeting facilitation, preparation of meeting materials, and note-taking for BerryDunn- and State-owned meetings.	Eduardo Daranyi Nicole Becnel Peter Alfrey Nicole Spears Tonya Roloson Brody McClellan Lisa Roberts Michelle Weaver Jonathan Watkins Jordan Ramsey Molly Hawkinson Caitlin Cabral Janine DiLorenzo Jonathan Williams	2,315



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none">• Prepare monthly project status updates, risks, issues, and briefings for the State leadership team.• Management of project logs (action item, decision, issue, and risk tracking).• Location of a project documentation repository in an agreed-upon SharePoint location. <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none">• Deliverable 2: Monthly Status Report• Deliverable 3: Project Timeline <p><i>Completion Criteria</i></p> <p>Project Execution and Control will be deemed complete upon completing the project and signature acceptance of the Project Closeout Summary by the DHHR project sponsor or their designee.</p>	Emily Hendrickson	
3.0	<p>Procurement Advisory Services</p> <p><i>Service Approach</i></p> <p>BerryDunn will provide project management services to support the activities surrounding the procurement.</p> <p>During the pre-procurement phase:</p> <ul style="list-style-type: none">• BerryDunn will prepare for the JRP sessions by researching requirements specific to the MHP effort. This research will include facilitating internal BerryDunn requirements sessions with BerryDunn team members who have experience with current DHHR policies. BerryDunn will participate in and/or conduct the JRP sessions and create the requirements inventory.• BerryDunn will be responsible for meeting attendance, facilitation, and/or note-taking (when requested by the State) during discussions in which requirements may be impacted. <p>During the procurement phase, BerryDunn will assist the State with the following:</p> <ul style="list-style-type: none">• Facilitating the procurement in collaboration with the State and other vendors.• Facilitating responses for one round of vendor	Peter Alfrey Nicole Spears Tonya Roloson Brody McLellan Lisa Roberts Michelle Weaver Jonathan Watkins Jordan Ramsey Molly Hawkinson Caitlin Cabral Janine DiLorenzo Jonathan Williams Emily Hendrickson	1,483



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>questions and answers.</p> <ul style="list-style-type: none">• Developing proposal evaluation packets.• Facilitating Evaluation Team meetings and scoring sessions, including organizing meetings, taking meeting notes, tracking action items, and participating as a non-voting advisory member of the team.• Provisioning of one subject matter expert (SME) review of each proposal.• Assisting with oral presentations.• Providing support for State and federal reviews of the RFP. <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none">• Deliverable 4: MHP RFP• Deliverable 5: Vendor Question Answers• Deliverable 6: Proposal Evaluation Packets <p><i>Completion Criteria</i></p> <p>Procurement Assistance will be deemed complete upon successful completion of the project and signature acceptance of the Project Closeout Summary by the DHHR project sponsor or their designee.</p>		
4.0	<p>Waiver Development and Implementation</p> <p><i>Service Approach</i></p> <p>BerryDunn will assist in waiver updates resulting from developing the new MHP RFP if needed.</p> <p>This support will include developing Waiver updates and an associated Waiver Implementation Plan.</p> <p>These services will also include the following:</p> <ul style="list-style-type: none">• Facilitation of planning meetings between DHHR, Managed Care Organizations (MCOs), federal partners, and other personnel to assist in developing the Waiver updates and the associated Waiver Implementation Plan.• Serve as the SMEs and assist the DHHR project manager in implementation tasks and activities.• Partnering with DHHR, MCO, and vendor personnel to assist in implementing the DHHR-approved Waiver Implementation	<p>Peter Alfrey Nicole Spears Tonya Roloson Jonathan Watkins</p>	275



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>Plan.</p> <ul style="list-style-type: none">Assisting DHHR in determining Readiness Review requirements, if any, that result from the waiver updates. <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none">Deliverable 7: Waiver Updates, if neededDeliverable 8: Waiver Implementation Plan, if neededDeliverable 9: Readiness Review Requirements Assessment <p><i>Completion Criteria</i></p> <p>Waiver Development and Implementation will be deemed complete upon signature approval of the Project Closeout Summary by the DHHR project sponsor or their designee.</p>		
5.0	<p>Implementation and Operations Transition Assistance</p> <p><i>Service Approach</i></p> <p>BerryDunn's will support stakeholder engagement, provide expertise, and track progress to help ensure a successful implementation and smooth transition to operations.</p> <p>This support will include the following:</p> <ul style="list-style-type: none">Facilitating recurring and ad hoc meetings with project stakeholders, including providing agendas, taking notes, and preparing materials for the meetings.Maintaining action items, risk, decision, and issue logs and provided regular reporting.Providing research and subject matter expertise, as needed. This could include assistance with policy development and review, program oversight tool development, reporting manual development, and analysis of managed care child welfare programs best practices. <p><i>Completion Criteria</i></p> <p>Implementation and Operations Transition Assistance will be deemed complete upon signature approval of the Project Closeout Summary by the DHHR project</p>	<p>Peter Alfrey Nicole Spears Tonya Roloson Brody McLellan Lisa Roberts Michelle Weaver Jonathan Watkins</p>	1,050



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	sponsor or their designee.		
6.0	<p>Project Closeout</p> <p><i>Service Approach</i></p> <p>BerryDunn will prepare a Project Closeout Summary upon contract award to a vendor. The Project Closeout Summary will summarize deliverables and work hours. The Project Closeout Summary will also identify any risks, issues, action items, or decisions that should be transferred to the implementation project.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none">• Deliverable 10: Project Closeout Summary <p><i>Completion Criteria</i></p> <p>The MHP Procurement Project will be deemed complete upon signature approval of the Project Closeout Summary by the DHHR project sponsor or their designee.</p>	<p>Ed Daranyi</p> <p>Nicole Becnel</p> <p>Peter Alfrey</p> <p>Nicole Spears</p> <p>Jon Watkins</p> <p>Jordan Ramsey</p> <p>Molly Hawkinson</p> <p>Caitlin Cabral</p> <p>Janine DiLorenzo</p> <p>Jonathan Williams</p> <p>Emily Hendrickson</p>	95
Total Hours			5,738
Total Not-to-Exceed Cost Estimate			\$877,995



3.0 Project Resources and Hours

The table below displays additional Staffing Plan details, total hours, and costs by resource, based on the hourly rates and staffing classifications provided in the Commodity Lines (CLs).

Table 2: Project Resources

CL Year 1	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
2	EM	\$270	Engagement Manager Nicole Becnel	183	\$49,410
1	LPM	\$215	Lead Project Manager Eduardo Daranyi	183	\$39,345
4	GPM	\$175	Program Manager Peter Alfrey	622	\$108,850
4	GPM	\$175	Project Lead Nicole Spears	1,269	\$222,075
4	GPM	\$175	SME Tonya Roloson	858	\$150,150
4	GPM	\$175	SME Brody McLellan	260	\$45,500
4	GPM	\$175	SME Lisa Roberts	520	\$91,000
4	GPM	\$175	SME Michelle Weaver	255	\$44,625
5	SS	\$80	Project Coordinator Jon Watkins	1,169	\$93,520
5	SS	\$80	Quality Assurance Jordan Ramsey Molly Hawkinson Caitlin Cabral Janine DiLorenzo Jonathan Williams Emily Hendrickson	419	\$33,520
			Total Hours:	5,738	\$877,995

EM = Engagement Manager
SS = Support Staff

LPM = Lead Project Manager

GPM = General Project Manager



4.0 Project Hours and Costs Per Month

The table below displays an overview of the project hours and estimated costs per month over the lifetime of the project.

Table 3: Project Costs by Month

Month #	EM Hours	LPM Hours	GPM Hours	SS Hours	Estimated Hours Per Month	Estimated Cost Per Month
Month 1	15	15	220	110	360	\$54,575
Month 2	10	10	210	90	320	\$48,800
Month 3	10	10	185	90	295	\$44,425
Month 4	10	10	205	95	320	\$48,325
Month 5	10	10	205	100	325	\$48,725
Month 6	10	10	349	115	484	\$75,125
Month 7	10	10	349	115	484	\$75,125
Month 8	10	10	275	110	405	\$61,775
Month 9	10	10	230	100	350	\$53,100
Month 10	10	10	205	80	305	\$47,125
Month 11	10	10	200	80	300	\$46,250
Month 12	10	10	200	80	300	\$46,250
Month 13	10	10	200	80	300	\$46,250
Month 14	10	10	255	100	375	\$57,475
Month 15	10	10	192	83	295	\$45,090
Month 16	14	14	152	80	260	\$39,790
Month 17	14	14	152	80	260	\$39,790
Total	183	183	3,784	1,588	5,738	\$877,995



5.0 High-Level Timeline

The following figure illustrates the proposed high-level timeline for planning activities.

Figure 1: Proposed High-Level Timeline

Task	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17
1.0 Engagement Oversight																	
2.0 Project Execution and Control																	
3.0 Procurement Advisory Services																	
4.0 Waiver Development and Implementation																	
5.0 Implementation and Operations Transition Assistance																	
6.0 Project Closeout																	



BerryDunn Authorized Signature

As a principal of this firm in our 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 not-to-exceed cost. Work to be invoiced to DHHR will be for actual hours expended, which may or may not equal the projected level of effort, but will not exceed the projected level of effort.

Nicole Y. Becnel 2022.04.05
10:57:12 -04'00'

Signature

Date

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

Frederick Lewis, Deputy
Commissioner

Digitally signed by: Frederick Lewis, Deputy Commissioner
DN: CN = Frederick Lewis, Deputy Commissioner email =
frederick.l.jewis@wv.gov C = AD O = DHHR OU = Integrity Plans
Management
Date: 2022.04.05 11:27:17 -05'00'

Signature

Date

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

Stacey Shamblin, Acting
Director

Digitally signed by: Stacey Shamblin, Acting Director
DN: CN = Stacey Shamblin, Acting Director email = stacey.j.
shamblin@wv.gov C = US O = WV DHHR OU = WV CHIP
Date: 2022.04.05 11:27:40 -05'00'

Signature

Date



Appendix A: Resumes

Nicole Becnel, PMP®

Proposed Project Role:	Engagement 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 State Self-Assessment (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 Application (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 healthcare 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 version 5.1 to version D.0. This work included project management of deliverable review, SME advisory services, user acceptance testing (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 for the Replacement MMIS. In her role, she was responsible for the oversight of the leverage and reuse, testing, and certification project activities.

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

- **Project Manager for MIHMS Provider Enrollment Application Project.** 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

**Eduardo Daranyi, MEd, PMP®**

Proposed Project Role:	Lead Project Manager
Role at BerryDunn:	Principal (employed with BerryDunn since 09/2005)
Years of Experience Relevant to Proposed Role:	18 years
Certifications and Education:	Master of Education, Lesley College BS, Physics, Mathematics, and Business Administration, Hillsdale College Certified Project Management Professional® Systems Engineering Development Program, Electronic Data Systems

Overview

Ed is a principal at BerryDunn with 20 years of experience managing and providing QA oversight of large-scale technology initiatives. He has served in a project management and QA capacity for Medicaid projects in Maine, Iowa, and West Virginia. Prior to joining BerryDunn, Ed worked for Electronic Data Systems as a systems engineer and systems manager. Ed served as implementation project manager for pharmacy benefits management systems and project coordinator while employed by Goold Health Systems.

Relevant Experience

BerryDunn (09/2005 to present). Ed is a principal in BerryDunn's Government Consulting Group, leading the Medicaid practice area.

- **Ohio Department of Medicaid – Ohio Medicaid Enterprise System Independent Verification & Validation (IV&V) Services (12/2016 to present).**
The Ohio Department of Medicaid is implementing its vision for a modular MMIS in the Ohio Medicaid Enterprise System project and BerryDunn is providing IV&V support. As project principal, Ed is overseeing the BerryDunn team.
- **West Virginia Bureau for Medical Services (BMS).**
 - *West Virginia Engagement Manager (06/2012 to present).*
In his role as engagement manager, Ed provides oversight of BerryDunn's contract with the Bureau to provide project management services for multiple projects, including the Molina Health PAS MMIS implementation; Medicaid Data Warehouse / Decision Support System DW/DSS implementation; Substance Use Disorder 1115 Waiver development and implementation; Affordable Care Act (ACA) analysis, and advisory services; ICD-10 compliance; Eligibility & Enrollment (E&E) systems modernization; Adult Quality Measures; CMS advance planning development; MITA 3.0 State Self-Assessment; WVCHIP implementation and stabilization; access to care planning and monitoring;



provider re-enrollment; Asset Verification System procurement; and other related initiatives.

- **QA Oversight of MMIS and Pharmacy Point of Sale (POS) Implementation (10/2005 to 03/2008).**

Ed provided QA services for West Virginia's MMIS implementation. In addition, Ed worked with the State to oversee several new initiatives that needed to be implemented while the new MMIS was becoming operational, including Medicare Part D and the HIPAA NPI. Ed also focused on establishing and assisting in the management of change management processes, and participated in the certification process and report process development.

- **West Virginia Department of Health and Human Resources (DHHR) – West Virginia Engagement Manager (06/2012 to present).**

In his role as engagement manager, Ed provides oversight of BerryDunn's contract with DHHR to provide project management services for multiple projects, including the E&E System modernization; procurement services; eligibility systems planning, procurement, and implementation; and other related initiatives.

- **Maine Department of Health and Human Services (DHHS) – IV&V and QA Services (04/2011 to 06/2012).**

BerryDunn provided IV&V, QA, and Technical Assistance services for the Molina MMIS and Fiscal Agent Solution development, implementation, and certification project. In addition, BerryDunn provided project management for the CMS certification of Maine's MMIS. As BerryDunn's project manager, Ed served as the primary liaison with DHHS, providing and managing a project management structure, developing and maintaining project management tools, managing the development of all deliverables, leading and overseeing the work of our team, evaluating project risks and issues, recommending strategies to address risks and issues, and communicating project status to DHHS.

BerryDunn also performed a point-in-time readiness assessment for several Pharmacy system initiatives for Maine DHHS, including a HIPAA 5010 transaction set readiness assessment and a pharmacy-related provider portal. Ed served as project manager for this assessment.

- **North Carolina Office of the State Auditor – Independent Audit of the State IT Services Enterprise Project Management Office (EPMO) (04/2007 to 06/2007).**

BerryDunn was hired by the North Carolina Office of the State Auditor to conduct an independent evaluation of IT projects managed by the North Carolina Office of IT Services' EPMO. Ed served as a lead analyst on this engagement. The objective of our evaluation was 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 included the review of North Carolina FAST (i.e., Families Accessing Services through Technologies), a program designed to improve the way North Carolina DHHS and county departments of social services do business.

Goold Health Systems (05/2001 to 08/2005).



- **Iowa Department of Human Services (06/2004 to 08/2005).** Ed served as technical project manager for the implementation of the Iowa Preferred Drug List/Prior Authorization project. In this role, Ed coordinated implementation activities; prepared reports for senior management; developed and monitored work plans; and performed research, analysis, and evaluation of programs, projects, and operational procedures.

From December 2004 to August 2005, Ed served as strategic project manager for Iowa's MMIS Pharmacy POS implementation. In this role, Ed managed implementation activities; prepared project status reports; developed work plans; and conducted research and analysis of programs, projects, and operational procedures.

- **GHS Data Management (04/2000 to 06/2004).** Ed served as project coordinator, technical writer, office manager, and training coordinator for GHS Data Management, which entailed developing and managing technical proposal preparation and writing; collaborating and developing strategy with senior management, the Medical Director, and staff pharmacist; providing company-wide management support for strategic project development; designing, developing, and authoring technical user documentation; and preparing and delivering training materials. GHS Data Management is a provider of services to Medicaid agencies across the nation.
- **Maine DHHS (05/2001 to 01/2002).** While employed by GHS, Ed served as technical project coordinator for Maine's MMIS Pharmacy Preferred Drug List and Supplemental Rebate implementation. In this role, Ed coordinated implementation activities; prepared reports for senior management; developed and monitored work plans; and performed research, analysis, and evaluation of programs, projects, and operational procedures.

Electronic Data Systems (08/1985 to 06/1988). Ed served as Systems Engineer and Systems Manager, with responsibility for maintaining the operating system for a cluster of mainframe computers, troubleshooting hardware and software problems, and overseeing security and access to software on the mainframe computers controlling a General Motors full-size pickup truck assembly plant. As a part of this work, he was on a team that implemented a new manufacturing and assembly system for the truck assembly plant.

Presentations

"Flexible Contracting and Contracting Best Practices," Presentation for Medicaid Enterprise Systems (MESG) 2014, 8/19/2014

**Peter Alfrey, PMP®, Prosci® CCP**

Proposed Project Role:	GPM OD Lead
Role at BerryDunn:	Manager (employed with BerryDunn since 03/2014)
Years of Experience Relevant to Proposed Role:	12 years
Certifications and Education:	MA, History, Providence College BA, Journalism and Communication, Spanish Minor, University of Oregon Certified Project Management Professional® Six Sigma Green Belt Certification Prosci® Certified Change Practitioner (CCP)

Overview

Peter is an experienced project manager and healthcare operations professional with an extensive record of leading successful projects, providing program management oversight, and managing healthcare operations and process improvement initiatives. From his work establishing a data governance council at the Vermont Green Mountain Board in 2014 to leading various projects for the West Virginia Department of Health and Human Resources and BMS, Peter brings comprehensive knowledge about health plan operations, process improvement, procurements and vendor management, and best practices that support Medicaid and health and human services client initiatives. He has a proven record of leading and collaborating with large, cross-functional teams to support system implementations, data management initiatives and policy initiatives.

Relevant Experience**BerryDunn (03/2014 to Present).**

- **West Virginia Bureau for Medical Services (BMS)**
 - *Enterprise Portfolio Management Office (EPMO) (09/2018 to present).*

Peter provides strategic direction for BerryDunn's EPMO team and for specific DHHR/BMS projects in the areas of project management best practices; process improvement; project staffing and recruiting; project funding and advance planning document (APD) development; and research and tracking of industry trends to support current and future EPMO projects. In addition, he is the program manager for the EPMO's MCO and data/analytics programs providing program oversight. EPMO projects and programs include:

 - *MCO Encounter Data Quality (06/2020 to present).*

Peter provided project oversight and serves as a business analyst supporting State Initiatives to optimize MCO encounter data processes for the State's risk-based managed care programs. The State seeks to retire



a historical file submission process from the MCOs to their MMIS fiscal agent, in coordination with the MCOs and the State's data warehouse/decision support solution (DW/DSS) vendor, IBM® Watson Health.

- *Data Improvement Project (09/2019 to present).*
Peter provides program oversight for the project that assists the State in understanding and addressing data quality and usability issues affecting its Medicaid program. BerryDunn helps BMS assess and address data quality and usability issues within the State's MMIS environment and other systems across the State's Medicaid Enterprise.
- *Mountain Health Trust (MHT) MCO Procurement Assistance Project Phases I and II (06/2019 to present).*
Peter provides project oversight and procurement assistance support for the procurement and implementation by July 1, 2020, of the three MCOs that comprise the current MHT program.
- *Contact Tracing (04/2020 to 09/2020).*
Peter provided project management support to DHHR for the implementation of the State's COVID-19 contact tracing platform in August 2020, helping the State coordinate its contact tracing initiatives and use of the contact tracing platform across a workforce of DHHR volunteers, the National Guard, West Virginia University staff, and State local health departments. He also supported the procurement and implementation of the contract tracing platform in less than three months, helped develop project communications and training tools, and developed 12 staff hiring requirements and job descriptions to support contact tracing and future Bureau for Public Health disease investigation efforts.
- *Coordinated Care Management Project Management and Procurement Assistance / MHP Implementation Project Management Support and Operational Readiness Review (02/2019 to 06/2020).*
Peter provided program management oversight for the desktop review of documentation for the MHP MCOs to help ensure the MCO met the operational standards of the MHP, a specialized managed care program to serve children in foster care and adoption assistance in the State. In addition, Peter provided project oversight and procurement assistance for the project, and developed policies and procedures for the procurement and implementation of the MCO for the MHP program that began operations on March 1, 2020. In addition, Peter provided project oversight for the MHP program as it transitioned to operations in March 2020 with the MCO, Aetna Better Health® of West Virginia.



- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (09/2020 to present).*

Peter serves as the organization development lead for the project leading the development of the organization development plan, roadmap, and schedule to help the State assess areas for improvement and change specific to departmental and Bureau(s) structure, operational improvements, talent development, and training. Organization development for the project will take the findings of the MITA SSA and focus on DHHR goals and objectives for its MMIS, the technical architecture assessment of the maturity levels of the State's Medicaid modules, and business area assessments of the State's Medicaid system modules.

- *Substance Use Disorder (SUD) Waiver Initiative Project (07/2017 to 03/2019).*
Peter was the project manager for the SUD waiver initiative leading the implementation of the "Creating a Continuum of Care for Medicaid Enrollees with Substance Use Disorders" Section 1115 waiver demonstration effective January 1, 2018, to December 31, 2022, which allows the State to strengthen its SUD delivery system to improve the care and health outcomes for State beneficiaries with SUD through expanded SUD service coverage and the introduction of new programs to improve the quality of care. He managed a large, cross-functional team focused on areas such as annual and quarterly reporting to CMS and financial reporting requirements for budget neutrality, future technology procurements to support the five-year demonstration, and MCO contract requirements specific to the SUD demonstration.

- *Asset Verification System Project Management Services and Procurement Assistance (04/2017 to 02/2018).*

Peter served as project manager for the Asset Verification System project that supported the State's objective of procuring Asset Verification System-related services for the State's Medicaid program. Under Peter's leadership and coordinating with the State, the project team developed and facilitated the request for quotation (RFQ) process that supported the procurement and development of the RFQ, evaluation of three vendor proposals, and implementation of the winning vendor in 2018.

- *Project Management of MMIS Procurement, DDI, and Certification (10/2014 to 12/2016).*

Peter served as a business analyst for the project, providing project management support and system integration testing (SIT) and UAT support prior to the go-live implementation of the system. He also led efforts for the reviews of MMIS and provider deliverables across a team of BerryDunn professionals coordinating updates to the deliverables prior to the go-live date. Peter served as the MCO and DW/DSS lead overseeing the transfer of historical data from the four State MCOs to the new MMIS that went live in January 2015; providing project management support for testing of historical encounter data before and after the



implementation coordinating efforts of the four MCOs and the fiscal agent; and overseeing testing efforts for transferring data from the MMIS to the State's DW/DSS in 2015 as the project transitioned from DDI to operations.

- **West Virginia Children's Health Insurance Program (WVCHIP)**
 - *Operational Readiness Review (09/2020 to present).*
Peter provides program management oversight for the desktop review of documentation for three MCOs to help ensure standards of the MHT and WVCHIP are met by the MCOs for the WVCHIP carve-in into the MHT by January 1, 2021.
 - *MCO Transition Planning Project Phases I and II (03/2019 to present).*
Peter provides project oversight to help the State integrate the WVCHIP member population with the State's Medicaid population to the MHT managed care program by January 1, 2021.
- **West Virginia Department of Health and Human Resources (DHHR).**
 - *Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project (09/2019 to present).*
Peter provides program oversight of the project that provides project management services, procurement assistance, and facilitation of the integration of data sources to the EDS and CMS certification support for the EDS Project.
 - *Integrated Eligibility Solution (IES)/People's Access to Help (PATH) DDI Project Management (08/2018 to 11/2019).*
Peter served as the organizational change management (OCM) lead for the IES, providing strategic direction and oversight to the project team. Peter built a joint team of individuals from the IES vendor, Optum, and BerryDunn to launch the OCM program and supporting communications campaign. During that time, OCM became a core component of the IES/PATH project. Through Peter's leadership, the OCM team created an OCM plan to launch OCM efforts for the project; created a communications toolkit and communications materials; and conducted over 50 interviews with individuals across DHHR for an OCM readiness assessment to support the IES/PATH project.
- **New Jersey Division of Medical Assistance and Health Services -- MMIS**
Implementation and Certification Leverage and Reuse Project (01/2017 to 08/2017).
Peter supported testing efforts for New Jersey MMIS implementation in areas such as SIT test case and results review, SIT test case analysis, UAT support, and UAT defect management. Such testing support leveraged and reused best practices and documentation from the West Virginia MMIS procurement in 2015.
- **Vermont Green Mountain Care Board – Vermont Health Care Uniform Reporting and Evaluation System (VHCURES) Independent Review, Procurement Assistance, and Project Management (05/2014 to 09/2014).**
Peter led the efforts to help the Green Mountain Care Board build a data governance



council in less than four months, helping develop the data governance council charter and structure as well as policies and procedures, and facilitating the data governance council's first public-facing meetings. He also supported 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.

- **Maryland Health Benefit Exchange (HBE) – Independent Verification & Validation for Maryland's HBE Implementation (03/2014 to 04/2014).**

As a business analyst, Peter worked with Maryland's Project Management Office and its strategic partners to coordinate projects. He monitored risks and issues across key assessment areas—such as project management; operations and maintenance; training; quality management and testing; requirements management; architecture; software development tools and release management; software product development, operations, and maintenance; and security.

Martin's Point Health Care (12/2008 to 02/2014). As the operations manager, Peter provided performance monitoring, process improvement, project management, data management, and operational efficiency and effectiveness for Martin's Point's Medical Management group. He managed cross-functional teams to implement complex projects; managed vendor relationships and contract negotiations; and served as client contact for external care management vendors.

Health Dialog (07/2006 to 11/2008). As Implementation Project Manager, Peter oversaw operational planning, execution, and reporting of multi-faceted projects for new and existing clients (health plans, large employers, and government care management programs), including BlueCross BlueShield (various regions), Capital Health Plan, and CMS. He also managed cross-functional implementation teams, maintained communications with clients, set expectations regarding scope, and managed implementation schedules while managing multiple, concurrent implementations. He also served as Project Management Office lead for company's smoking cessation nicotine replacement solution and initiative overseeing product development work and collaboration with third-party vendor.

Presentations

The 2020 Final Rule—Understanding new flexibilities to control costs and deliver care, a BerryDunn blog, 11/2020

COVID-19 and Opportunities to Reboot Managed Care, a BerryDunn blog, 09/2020

The Case for Data Governance in the Modular Medicaid Enterprise, a BerryDunn blog, Medicaid Enterprise Systems Conference (MESOC), 09/2016

Session abstract "State Roundtable on Section 1115: Substance Use Disorder (SUD) Demonstrations; Updates from states who are implementing Section 1115 Waivers to combat the opioid crisis. Focus on opportunities and challenges in each state, opportunities for partnership and collaboration, leverage and reuse" selected by MESOC organizers for a conference in Portland, Oregon, featuring representatives from West Virginia, Virginia, and Massachusetts, 09/2016



Innovation in a Digital Era: Using Data to Pivot to "the New" presentation for MESC 2016, co-presented with a BerryDunn colleague and professionals from Accenture plc (Accenture), 09/2016



Nicole Spears, MBA

Proposed Project Role:	Project Lead, Subject Matter Expert
Role at BerryDunn:	Senior Consultant with BerryDunn since July 2021
Years of Experience Relevant to Proposed Role:	13 years
Certifications and Education:	Bachelor of Science in Corrections, University of Indianapolis Master of Business Administration, focus in Healthcare Management, Western Governors University

Overview

Nicole is a senior consultant for BerryDunn's Medicaid Practice Group with deep expertise in healthcare consulting, including Medicaid Management Information System (MMIS) and managed care. With nearly 15 years' experience in change management, Nicole has comprehensive knowledge of Managed Care Organization (MCO) and vendor oversight, program development and implementation, and Software Development Life Cycle (SDLC) monitoring. She has a long history advising senior leadership on high-profile, complex implementations with large, cross-functional teams.

Experience

BerryDunn (July 2021 to present). Nicole works as a subject matter expert (SME) on West Virginia Bureau for Medical Services' Managed Care Encounter Data Quality Project, an assignment focused on supplying project management services to the state to assist with the transition of managed care encounter claims from a proprietary format to electronic data interchange (EDI). This project is also developing an SDLC Coordination Plan to operationalize updates based on state prioritization which will transition to state ownership. She also is currently serving as the SME for the West Virginia Department of Health and Human Resources (DHHR) MES Modernization Strategy project, a project focused on the planning activities for an MES modernization strategy and procurement. The project will plan and estimate implementation costs for a modernized MES and also aid the State in meeting several of its identified Medicaid Information Technology Architecture (MITA) goals.

Gainwell Technologies (December 2017 to July 2021). Nicole worked as a senior business advisor for the Member Management Module Team as Kansas developed a new modular MMIS. The Member Management Module includes: Member Eligibility, Medicare Management, Eligibility Verification Systems (EVS), and Early and Periodic Screening, Diagnostic, and Treatment (EPSDT). Nicole also led the Business Analysts in the module and produced the end products User Interface (UI) design and security for all subsystems, as well as all system documentation for subsystems (Design Expectations Document, Detailed System Design, Business Design Documentation, etc.), subsystem certification through the Medicaid Enterprise Certification Toolkit (MECT) and provided expertise for testing for all subsystems (i.e., test plan, results, and defect review).

SR Advise (January 2016 to December 2017). Nicole worked as the account manager for SR



Advise with the goal of growing business in the public health arena. Nicole developed and implemented company policies and procedures to ensure alignment with client contracts and compliance with government and minority business entity regulations. She developed and managed a new internship program to grow a pipeline for future staffing and cultivated relationships with industry and client leadership to grow the business. Nicole also directed the business development strategy and led Request for Proposal (RFP) responses. Her efforts resulted in adding several new clients and contracts valued at over \$2 million in her short time with the company. She also served as a senior consultant on several projects providing comprehensive change management services to meet clients' individual business objectives.

SVC, Inc. (July 2012 to December 2015). Nicole worked as the operations and MCO SME for the company. Nicole managed high-profile, complex program and system implementations reporting to and advising senior leadership. She assisted in the development of Medicaid pilot programs by identifying potential operational and implementation impacts and proposing best practices. Nicole also identified areas of opportunity and recommended strategies for process improvement for clients' established programs through the consideration of potential impact(s) of policy and program changes on operations and vendors. She led multifaceted system and program changes in the Medicaid Managed Care arena based on these recommendations. Her experience includes RFP development and response, policy manual creation, MMIS DDI communications development, readiness review development, and administration.

State of Indiana. (July 2008 to April 2012). Nicole worked as the operations and MCO SME for State of Indiana. Nicole was hired to overhaul the business side SDLC processes for the unit. In this newly established role, she led multiple cross-functional teams while managing system changes impacting Indiana Medicaid, with a focus on vendor system integration. As the Managed Care technical SME with extensive knowledge of MMIS and vendor systems, Nicole helped establish and design the new change control team. This team oversaw scope, ensured requirements and design, served business needs, and provided the opportunity for system integration by giving vendors a voice at the table. This role also oversaw vendor compliance. Nicole directed her staff in executing audits and quality control on MMIS and vendor systems changes, as well as MCO performance reporting. This oversight formed recommendations to the compliance team on corrective actions and performance monitoring. Nicole also served as a policy analyst on the OMPP project to direct project implementation, policy development, and program management of Governor Daniel's 1115 waiver program, HIP. She served as the technical resources liaison between vendors and program management with extensive knowledge of the state's Medicaid systems. In this role, she oversaw SDLC and policy impacts for all large initiatives impacting the Managed Care Unit. Nicole also oversaw seven vendors, which included the development of program manuals, dashboards and on-site review processes to ensure contractual and regulatory compliance of four MCOs.



Tonya Roloson

Proposed Project Role:	Subject Matter Expert
Role at BerryDunn:	Consultant with BerryDunn since November 2021
Years of Experience Relevant to Proposed Role:	17 years
Certifications and Education:	Associate of Science in Business Administration, State University of New York Delhi Bachelor of Science in Wellness Management, State University of New York Oswego Youth Police Initiative Certified trainer Youth Mental Health First Aid Certified Trainer Cornell TCI Certified Trainer

Overview

Tonya is a consultant with experience working on Medicaid initiatives for various agencies and populations. She has more than 17 years' experience working with youth in residential programs as well as more than 5 years of experience as a Medicaid program manager. She is well-versed in claims, eligibility, stakeholder compliance, and federal and state regulations.

Experience

PCG-SSO LLC, New York Department of Health (November 2016 to October 2021). Tonya worked as the Medicaid program manager to collaborate with inter-agency State teams creating policy and implementation strategies for Children's Behavioral Health in NYS. She developed multiple Medicaid waivers and State Plan Amendments, including: 1115 demonstration waiver, 1915(c), 1915b.4, acted as a subject matter expert on program pieces relating to internal Requests for Proposals (RFPs). Tonya ensured RFPs were written directly to CMS standards, created work plans, and monitored timelines, working cross functionally with state agencies including: Office of Mental Health, Office of People With Developmental Disabilities, Office of Children and Family Services, Office of Addiction Services and Supports, New York state office of Temporary and Disability assistance, and Dept. of Health. She also reviews fee-for-service and Medicaid managed care claims, denial reports and utilization to develop reports for stakeholders and compliance. She engaged CMS directly, developed Medicaid policy, and reviewed financial/implementation reports for grant funded projects. Tonya also reviewed Medicaid Managed Care Plan readiness as related to model contract and Children's Behavioral/Physical Health Standards and reviewed policy according to department and program needs. She performed readiness and compliance reviews, liaised with stakeholders, and monitored and implemented policy for Medicaid billing and enrollment. She worked with stakeholders to develop or update state regulations and/or Public Health Law.

St. Catherine's Center for Children (May 2014 to November 2016). Tonya worked as the director of training and staff development to maintain electronic records of staff performance on training compliance, facilitate agency training for employees (including medication management, documentation, crisis intervention, safety in the workplace, motivational interviewing, youth



police initiative and youth mental health first aid), and reviewed policy, procedure, and compliance records across all agency programs. She maintained and created platforms for staff to attend and receive training while maintaining training documents and materials. Tonya monitored Medicaid and HIPAA compliance and reviewed policies as needed. She collaborated with the QA Team to ensure quality metrics were met and regularly attended Medicaid trainings to keep the teams and strategies were up to date. She reviewed case file notes, Medicaid eligibility, and monitored Medication Management compliance.

RTF Parsons child and Family Center (August 2010 to November 2016). Tonya worked as a relief residential counselor in charge of caring directly for youth 12-18 in an OMH Residential treatment facility. She ensured accuracy on performance delivery within the program and that documentation standards were met. She also worked as a crisis prevention specialist to create individual crisis plans and practices while ensuring agency policies are maintained. In this role she maintained progress reports around goals and compliance measures and prepared monthly reports of data to show that standards were being met. Her initial positions as assistant residential supervisor and residential counselor had her oversee program operations, perform administrative duties, and maintain accurate documentation.

“Choices Enhanced” Catholic Charities (August 2008 to September 2010). Tonya worked as the project director partnered with Syracuse University to create new policy, review policy of each contract partner and ensure all policy is consistent with program deliverables. She ensured program fidelity, quality assurance, and data collection procedures were strictly adhered to and wrote the RFP that was approved by health and human services, to address teen pregnancy. She developed program plan and implementation of new program under Scientific design (control and treatment groups in a community setting) while maintaining budget and supervising staff and payroll.

Toomey Residential Program (April 2004 to August 2009). Tonya worked as a recreation specialist in direct care of youth 6-15 years old in an OMH Children’s residential program. She supervised daily program activities and ensured accurate documentation and regulatory standards were met



Brody J. McClellan, MPA

Proposed Project Role:	Lead Project Manager,
Role at BerryDunn:	Senior Consultant with BerryDunn since September 2021
Years of Experience Relevant to Proposed Role:	14 years
Certifications and Education:	Bachelor of Arts in Political Science, Michigan State University Master of Public Administration, focus in Health & Human Services Administration, University of Arizona CPA Exam Prep, Accounting AB

Overview

Brody is an innovative consultant with 14 years of experience in Medicaid, including as a state administrator and program officer with Michigan's Medicaid Actuarial Division, Outreach and finance specialist at an academic medical center, and work as a consulting project lead for California's Medicaid Directed Payments. Subject matter expert in Medicaid finance with experience in program operations, Intergovernmental Transfers, Directed Payments, Pass-Through Payments, UPL programs, charity donation leveraging, Graduate Medical Education programs, and encounter data management. Collaborative communicator continually focused on building relationships and promoting synergy across business lines and global units to drive positive change, cohesive, comprehensive business approaches and enhanced profitability

Experience

Mercer GHSC (October 2019 to July 2020). Brody worked as a senior consultant with roles as project manager and project leads for lead for two actuarial rates team for California Medicaid. He also served as Subject Matter Expert on various national Medicaid Financing advising projects. As project manager and lead, he improved business operations on actuarial rates teams focused on Directed Payments and Medicaid Eligibility. His work included managing credentialed actuaries throughout rate setting cycles to produce certified rates, formal project planning creations, analysis of project process, rate setting modeling process review, documentation process review, and process engineering analysis to correct problematic projects in line with management directives. Brody was also responsible for the creation of consulting communication training to assist staff and enhance effectiveness on external debriefing and client interaction and corporate intellectual capital including CMS pre-print responses and program design language, financial modeling templates and writing external articles. Brody was recognized as a technical and policy specialist for Medicaid Rates and Managed Care structure; Medicaid Upper Payment Limit (UPL) rules, and methodologies such as hospital UPL and physician UPL programs

Independent Consultant (October 2019 to June 2020). Brody served as an independent consultant with broad subject matter specialty in Health Insurance and Public Safety Programs including Medicaid. He partnered with clients to establish, sustain, and fortify business relationships while leveraging business development opportunities. He offered expertise in



program implementation and bridging communication between senior decision makers and technical stakeholders.

Sellers Dorsey & Associates, LLC (October 2017 to October 2019). Brody worked as a senior consultant with scopes of work experience in 16 states. He advised clients including hospital systems, physician practice groups, associations and state Medicaid agencies on a variety of Medicaid subject areas, focusing on Medicaid special financing programs. He also functioned as a Health Policy Specialist, General Medicaid financial and budget specialist, and General advisor on Medicaid Waiver programs (115 waivers). He created policy documents adopted and used by state governments and developed rate analytics accepted by federal government as methodologically sound.

Michigan State University (April 2015 to October 2017). Brody worked as the Medicaid Federal Leveraging Specialist & Access to Care Program Manager (Medicaid Special Financing Project) as well as Data Science & Analytics/Business Intelligence Cell lead for the University. He delivered high-level program financial management and control including invoicing, payments and encumbrances processing, intergovernmental transfer processing, and revenue control functions. He provided oversight of two subordinates responsible for program management and support and also directed cross-functional teams across the organization. He administered over 100 contracts, consulted with contracted affiliate Hospital and Provider Clinics regarding Medicaid compliance, program structure, and access to care issues and financial maximization strategies allowed within compliance standards, and liaised with the State of Michigan Medicaid Office.

State of Michigan (December 2007 to April 2015) Brody worked as a department specialist to extract and analyze data from diverse sources including the MSA data warehouse using all available software and tools. He created and managed—what was at the time—the largest Medicaid physician "special financing" program in the country, and designed and implemented ACA mandated primary care rate increase program. Brody served as senior analyst with program management functions for multiple special financing projects, assisted rate specialists, and executed quarterly database analysis and calculations needed to reprice public physician entity (PE) fee-for-service claims pursuant to the Physician Adjuster Payment policy. He also performed annual database analysis to determine the amount of SNAF load to include in the upcoming year's managed care capitation rates and executed reconciliations and other support procedures as needed to insure the proper flow of SNAF funds between MSA, the health plans and the public entities.



Lisa Roberts

Proposed Project Role:	Subject Matter Expert
Role at BerryDunn:	Senior Consultant (employed with BerryDunn since 02/2021)
Years of Experience Relevant to Proposed Role:	30 years

Overview

Lisa is a highly capable hands-on leader with a demonstrated ability to enlist the enthusiasm and participation of internal staff and external customers. She brings expertise with public programs including TANF, SNAP, CHIP, Medicaid, and Developmental Disabilities programs. Her experience includes managing government contracts and budgets, overseeing multi-state programs, and building strong professional relationships.

Relevant Experience**Embassy Management, LLC (05/2009 to 02/2021)**

- **Executive Vice-President of Operations and Workforce Services (03/2013 to 02/2021).** In this role, Lisa has oversight of four Operating Companies providing services in New Mexico, California, Washington and Oregon. Government funding sources and contracts that she is responsible for managing include:
 - Medicaid Waiver Services in California, Washington and Oregon.
 - Federal TANF funding for a statewide program throughout New Mexico
 - County funded services throughout Washington.
 - Residential services for individuals with a Developmental Disability in Los Angeles and Sacramento
- **Vice-President of Workforce Services (06/2011 to 02/2013).** During her time in this role, Lisa authored the winning statewide proposal to provide TANF employment and case management services for the State of New Mexico. The initial contract award was for \$8.9M; Lisa was successful in expanding the contracted services to over \$20M annually within three years.
- **Director of Workforce Services (05/2009 to 05/2011).** Lisa was responsible for the oversight of workforce services providing employment services for individuals with developmental disabilities and other vulnerable adults. She oversaw eight county-funded contracts and programs throughout Washington State providing competitive community employment opportunities for individuals with developmental disabilities.

Arbor Education and Training, LLC (04/2003 to 04/2009). As the Idaho State Director for Enhanced Work Services Program, Lisa provided oversight including fiscal management, contract performance outcomes, evaluation and improvement for TANF funded services through the Idaho State Division of Welfare for two separate regions.

Idaho Division of Welfare (09/1991 to 03/2003). During her 13-year tenure with the State of Idaho, Lisa held various positions including determining eligibility for SNAP, Medicaid, TANF,



Child Care, Aid to the Aged, Blind and Disabled (AABD). The following highlight positions held during her tenure:

- Interim Regional Program Manager
- Self-Reliance Supervisor
- Self-Reliance Trainer
- Eligibility Examiner



Michelle Weaver

Proposed Project Role:	Subject Matter Expert
Role at BerryDunn:	Subcontractor (with BerryDunn since 04/2021)
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	BS, Chemical Engineering, Virginia Polytechnic Institute and State University Achieve Global – Leadership for Results Trainer Certification

Overview

Michelle is a data-driven executive level leader with over 20 years of experience in operations of private sector community-based services for adults and children with intellectual and developmental disabilities. Michelle has significant ground-up experience and operational insight, as well as detailed working knowledge of other functions within organizations including human resources, finance, information technology, clinical, quality, and compliance. She possesses in-depth understanding of the regulatory and funding environment in the intellectual disability (ID)/developmental disability (DD) service industry, as well as expertise in a diverse array of services including residential (supported living, ICF/ID, licensed homes, and specialized residential facilities), autism/behavioral, day programs, and supported employment.

Relevant Experience**Opt2Inspire LLC (08/2019 to present)**

As managing director and consultant, Michelle provides consultation and project management services to business in the ID/DD space. In this role, she supports firms in the diligence and deal process and assists organizations in preparing for sale.

Embassy Management LLC and SL Start & Associates (09/1998 to 05/2019)

In her 21 years with SL Start & Associates and Embassy Management LLC (SL Start was acquired by Embassy Management in 2011), Michelle held a variety of positions, including the following:

Chief Operating Officer (04/2014 to 05/2019) – As COO, Michelle provided oversight for day-to-day operations of six subsidiary operating companies providing supported-living, residential habilitation, licensed homes, employment services, day treatment, and behavioral and therapeutic supports in several states. In this role, she managed \$160 million in annual revenue, with approximately 3,400 employees. Additionally, she oversaw program operations; managed development of new services and integration of acquisitions; and maintained relationships with state agencies, counties, and other customers and community partners, including negotiation of reimbursement rates and regulatory changes.



Chief Development Officer (08/2012 to 04/2014) – As Chief Development Officer, Michelle developed proposals and project plans in response to Requests for Proposals/Qualifications; provided support to operations teams in startup and other organic growth efforts; and oversaw mergers and acquisitions.

Vice President of Developmental Disabilities Agency Operations (09/2006 to 08/2012) – In this role, Michelle oversaw and directed division operations providing developmental therapy and behavior intervention services to children and adults with disabilities in multiple locations across Idaho and Washington. She developed and maintained policies and procedures to ensure compliance with state and federal regulations, as well as alignment with organizational objectives. Additionally, she ensured division-wide communication and training on policy and regulatory changes and updates; oversaw and assisted with preparation for internal and external quality assurance, licensing, and certification audits; and participated in the state-wide provider association, including serving a two-year term as president.

Vice President of Business Systems (02/2005 to 09/2006) – As VP of Business Systems, Michelle served as project manager for an initiative to standardize multi-state operations throughout the assisted living division and developmental disabilities program division. Additionally, she facilitated development and implementation of the Tailored Life® Process for operations, defining the systems, policies and procedures, processes, and training for providing personalized senior resident care and services for individuals with disabilities. In this role, Michelle also facilitated implementation of case management software across five senior living communities in two states.

Trainer/Senior Trainer (10/2002 to 02/2005) – In this role, Michelle established training schedules and facilitated leadership, new hire orientation, and job specific training, both classroom and on the job, for managers and other employees across the company.

Branch Manager (11/2000 to 10/2002) – As branch manager, Michelle provided oversight of residential habilitation services in ten community-based homes for adults with developmental disabilities.

Eastman Chemical Company (08/1991 to 06/1998)

As project manager and process improvement engineer, Michelle planned and executed multiple projects to improve product quality, increase yields, increase production rates, and improve process safety at a chemical production facility. Additionally, she provided technical assistance in the startup of a new production facility in Mexico, which included living and working in Mexico for three months.



Jonathan Watkins

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Project Coordinator with BerryDunn since 11/2021
Years of Experience Relevant to Proposed Role:	5 years
Certifications and Education:	Bachelor of Science in Criminal Justice, West Virginia University at Parkersburg

Overview

Jonathan is a Project Coordinator with BerryDunn with a history of working in high pressure, fast paced roles that require attention to detail, precise communication and organization. His consistent and dependable skills in account management and customer service have allowed him to successfully serve clients and companies in the public and private sectors.

Experience

CAMC Hospital (January 2021 to November 2021). Jonathan scheduled and coordinated both inpatient and outpatient cases which included registering patients, verifying insurance, billing and customer service. In addition, he organized the day to day needs of the unit and performed basic bookkeeping duties.

Greenhills Country Club (May 2016 to January 2021). Jonathan scheduled and organized golf tournaments for the country club. This included coordination with the PGA Professional and all parties involved with the tournament. He was also responsible for organizing, taking minutes, and processing documents related to Board Meetings. His duties also included recruiting new members and employees, training new hires, day to day bookkeeping duties, and invoicing.

Jackson County 911 (January 2020 to December 2020). Jonathan received and dispatched all emergency and non-emergency calls for EMS, Law enforcement and Fire for the County. This role required the multitasking of multiple calls per minute, operating both radio and telephone console, and heavy documentation of the recording per call.



Jordan Ramsey

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Senior Editor (employed with BerryDunn since 07/2019)
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 a senior writer/editor in BerryDunn's Government Consulting Group and team lead of Editorial/QA. He provides document quality assurance and editing for BerryDunn client deliverables and marketing/communications documents. Jordan is a Poynter American Copy Editors Society (ACES) Certified Editor and holds a MA in English: Professional Writing.

Relevant Experience

BerryDunn (07/2019 to present). In his role as senior writer/editor, Jordan manages a team of editors and proofreaders who work in Portland, ME, and remotely across the country. He was responsible for implementing a new submission ticketing system for Editorial/QA, as well as organizing multiple years of fiscal year Editorial/QA data, communicating with consultants regarding edits and turnaround times, and creating and providing multiple writing presentations.

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 provides new-hire orientations 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 Illinoian (2014 to 2015). As copyeditor, 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.

**Molly Hawkinson**

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Senior Writer/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 senior writer and 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.



Jonathan Williams

Proposed Project Role:	Project Management Support Staff
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 spelling, as well as wrote copy for planning guides included with shipments.

**Emily Hendrickson**

Proposed Project Role:	Project Management Support Services
Role at BerryDunn:	Paraprofessional (employed with BerryDunn since 07/2017)
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	BA, English Literature and Language, Gordon College BA, Biblical and Theological Studies, Gordon College

Overview

Emily is a paraprofessional with BerryDunn's Government Consulting Group, specializing in document quality assurance, editorial duties, and project coordination. She works with clients across BerryDunn's areas of focus, including local government entities, higher education institutions, and state agencies. She is a published author, and an experienced copyeditor.

Relevant Experience

BerryDunn (07/2017 to present). Emily serves as a paraprofessional and editorial assistant, supporting BerryDunn consultants with proofreading, editing, and other quality assurance tasks on written material, including client deliverables.

Martin's Point Health Care (04/2016 to 07/2017). As a patient services representative, Emily was responsible for queue management, including phone messaging and appointment scheduling. She collaborated with the Health Information Management team to identify areas for improvement in document tracking to help close care gaps and increase Quality Measure metrics, and supported and facilitated communications related to labs, scripts, messaging to providers, etc.

Youngclaus & Company (01/2016 to 04/2017). As a tax return collector for the 2016 and 2017 tax seasons, Emily scanned client financials and ensured accurate electronic filing of both client and account documents in company database per standard work flow. She performed quality review of documents after scanning to ensure accuracy and completeness of the electronic file; assembled, collated, and logged tax returns for accountants; and reviewed returns to ensure figures tied, return was in order, and any attachments were included.

Seacoast Christian School (09/2014 to 06/2015). Emily taught English and Creative Writing, as well as researched, designed and taught creative writing curriculum; adapted lesson plans to achieve educational objectives both short-term and long-term; demonstrated classroom management skills while inspiring students to succeed in learning; proficiency in schedule management. She also acted as Class Advisor to senior class, which involved organized fund-raising events and the senior trip.

Civil Consultants (09/1999 to 07/2014). As an administrative assistant, Emily provided daily front-desk management of engineering and surveying firm—typing, editing and proofreading proposals, project submittals, and correspondence to clients and governmental agencies;



printing and assembling reports; general administrative support. She acted as point of contact for customer inquiries for surveying or engineering needs; assisted clients in retrieving project materials; maintained paper and electronic filing. While there, she was also responsible for graphic design work for projects and advertising.

Gene Paltrineri Photography (04/1998 to 12/2003). Emily served as a second photographer at weddings, capturing events from a photojournalistic perspective; attended seminars; trained in formal portraiture; developed black and white prints. She also had basic office management responsibilities, including overseeing each wedding project from start to finish.

Foster's Daily Democrat (04/1996 to 08/1999). As a newspaper copy editor and graphic artist, Emily worked on the news desk editing reporters' stories for syntax, grammar, style, and content.

**Caitlin Cabral**

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Employed 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 Editorial/QA team who has demonstrated experience in project management, administrative oversight, and organizational duties. She is a self-motivated learner with a strong academic history and the ability to master several roles in the workplace.

Experience

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.



Janine DiLorenzo

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Editor with BerryDunn since January 2022
Years of Experience Relevant to Proposed Role:	12 years
Certifications and Education:	Bachelor of Arts in Early Childhood Education, Stonehill College

Overview

Janine has more than 10 years' experience writing reports, grants, and outreach materials; designing graphics and publications; and creating communication/organizational systems in education and non-profit organizations. She has worked with educational institutes to develop skills in project management, communication, and planning.

Experience

Breakwater School (August 2019 to August 2021). Janine worked as a Preschool Teacher to collaborate with co-teachers to write and implement culturally-responsive and developmentally-appropriate curriculum and assessments, emergent to children's individual interests, strengths, and needs. She wrote weekly curricular updates and quarterly developmental reports to relay children's growth and learning, and to foster home-school connections. Janine also led teaching team in developing centralized communication channels and organizational systems for unit explorations, documentation of learning, and family communications.

Community Connections of Brockton (June 2011 to June 2018).

- **Program Coordinator (June 2014 to June 2018)**
Janine worked to organize the Clemente Course in the Humanities and a cohort of College Unbound—alternative higher-education opportunities for economically disadvantaged adults—in partnership with local colleges, non-profits, and public/private funding sources. She taught writing and portfolio development to diverse groups of adult students matriculating into undergraduate programs. She worked on editing with students, designed outreach materials, set up databases, and reported on program outcomes. Janine led internal and external communications, and managed all program operations while also writing successful grant applications and sponsorship appeals to secure public and private funding.
- **AmeriCorps*VISTA, Brockton's Promise Coordinator (August 2012 to August 2013)**
Janine coordinated communications and logistics among five committees in a cross sector, citywide coalition that addresses youth education, health, safety, and civic engagement. She led strategic planning process to heighten coalition's impact, calling



for comprehensive, coordinated service delivery. She rewrote the mission, vision, and goals to better reflect coalition's purpose. She published a research-based series of indicators for Brockton's Promise to measure the well-being of the city's youth and assess collective impact and also wrote copy for website and social media outreach channels.

- **AmeriCorps*VISTA, Brockton Parents Magazine (June 2011 to August 2011)**

Janine led all aspects of production for the inaugural issues of Brockton Parents Magazine, in partnership with parent volunteer editorial team. She assigned, wrote, and edited articles; solicited and created advertisements, laid out 32-page full color spreads in InDesign; and completed pre-press packaging procedures for printing. Janine grew a 10,000 copy distribution via businesses, schools, municipal buildings, and social service agencies.

Stonehill College (August 2010 to May 2011). Janine worked as the Student Co-Director of Volunteerism to maintain relationships with over 30 community partners & 600 student volunteers. She designed and led trainings and reflections for the Student Service Leadership team, recruited volunteers, met community partner service needs, arranged logistics, and organized events to promote awareness of local justice issues and service opportunities. Additionally, she tracked volunteerism data for college and national Carnegie reporting.



Appendix B: Deliverable Dictionary

Table 4: Deliverable Dictionary

Deliverable #	Deliverable Name	Deliverable Description
1	Commissioner Briefing	Monthly status update on the Mountain Health Promise Procurement Project.
2	Monthly Status Report	Monthly status update for the Mountain Health Promise Procurement Project.
3	Project Timeline	Timeline for the Mountain Health Promise Procurement Project.
4	Request for Proposal	A finalized Request for Proposal for Mountain Health Promise program.
5	Vendor Question Responses	Documented responses for one round of vendor questions and answers.
6	Proposal Evaluation Packets	Proposal evaluation packets to assist the Evaluation Team meetings and scoring sessions.
7	Waiver Updates, if needed	Updates made to the Waiver, if any are identified during the project.
8	Waiver Implementation Plan, if needed	Development of a plan to implement any waiver updates identified during the project.
9	Readiness Review Requirements Assessment	Documented Readiness Review requirements, if any, that result from the program, waiver, or contract updates.
10	Project Closeout Summary	Inventory of all project documentation and deliverables and documentation of the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member.



Appendix C: Acronyms/Abbreviations

Table 5: Acronyms/Abbreviations

Acronym/ Abbreviation	Definition
AABD	Aid to the Aged, Blind and Disabled
ACA	Affordable Care Act
APD	Advance Planning Document
ASC	Accredited Standards Committee
BA	Business Analyst
BMS	Bureau for Medical Services
CCP	Certified Change Practitioner
CL	Commodity Line
CMS	Centers for Medicare & Medicaid Services
DD	Developmental Disability
DHHR	Department of Health and Human Resources
DHHS	Department of Health and Human Services
E&E	Eligibility & Enrollment
EDI	Electronic Data Interchange
EDS	Enterprise Data Solution
EM	Engagement Manager
EPMO	Enterprise Project Management Office or Enterprise Portfolio Management Office
EPSDT	Early and Periodic Screening, Diagnostic, and Treatment
EVS	Eligibility Verification Systems
Gainwell	Gainwell Technologies
GPM	General Project Manager
HBE	Health Benefit Exchange
IAPD	Implementation Advance Planning Document
IAPD-U	Implementation Advance Planning Document Update
ID	Intellectual Disability
IES	Integrated Eligibility Solution
JRP	Joint Requirements Planning



Acronym/ Abbreviation	Definition
AABD	Aid to the Aged, Blind and Disabled
LPM	Lead Project Manager
MCO	Managed Care Organization
MECT	Medicaid Enterprise Certification Toolkit
MESC	Medicaid Enterprise Systems Conference
MHP	Mountain Health Promise
MHT	Mountain Health Trust
MITA	Medicaid Information Technology Architecture
MMIS	Medicaid Management Information System
OCM	Organizational Change Management
OD	Organization Development
PATH	People's Access to Health
PC	Project Coordinator
PEA	Provider Enrollment Application
PMP®	Project Management Professional®
PMSS	Project Management Support Staff
POS	Point of Sale
QA	Quality Assurance
RFP	Request for Proposals
RFQ	Request for Quotation
SDLC	Software Development Life Cycle
SIT	System Integration Testing
SME	Subject Matter Expert
SOW	Scope of Work
SUD	Substance Use Disorder
SS	Support Staff
SS-A	State Self-Assessment
State	West Virginia
UAT	User Acceptance Training
UPL	Upper Payment Limit



Acronym/ Abbreviation	Definition
AABD	Aid to the Aged, Blind and Disabled
VHCURES	Vermont Health Care Uniform Reporting and Evaluation System
WVCHIP	West Virginia Children's Health Insurance Program