



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 BMS2200000026 1	Procurement Folder:	1027874
Document Name:	Data Improvement Project-Phase 3	Reason for Modification:	
Document Description:	Data Improvement Project-Phase 3		
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

Purchasing Division's File Copy

Total Order Amount:	\$767,700.00
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CH 4/15/22

PURCHASING DIVISION AUTHORIZATION SIGNED BY: Linda B Harper <i>Linda Harper</i> DATE: 2022-04-12 <i>4-20-22</i> ELECTRONIC SIGNATURE ON FILE

ENTERED

ENCUMBRANCE CERTIFICATION <i>Beverly Tolson</i> DATE: <i>4-21-2022</i> ELECTRONIC SIGNATURE ON FILE
--

Extended Description:

Data Improvement Project-Phase 3 Project

Service Period: 05/01/2022-02/28/2023

Total Not-To-Exceed Cost: \$767,700.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$4,300.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2022-05-01	2023-02-28				

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

Lead Project Manager: Base Year One

Hourly Rate: \$215.00

Ed Daranyi: 20 Hours @ \$215.00=\$4,300.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$10,800.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2022-05-01	2023-02-28				

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

Engagement Manager: Base Year One

Hourly Rate: \$270.00

Nicole Becnel: 40 Hours @ \$270.00=\$10,800.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$714,000.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2022-05-01	2023-02-28				

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

General Project Manager: Base Year One

Hourly Rate: \$175.00

Jim Highland: 40 Hours @ \$175.00=\$7,000.00
Andrea Clark: 200 Hours @ \$175.00=\$35,000.00
Peter Alfrey: 100 Hours @ \$175.00=\$17,500.00
Jeff Stoddard: 900 Hours @ \$175.00=\$157,500.00
Susan Chugha: 300 Hours @ \$175.00=\$52,500.00
Lloyd Butler: 480 Hours @ \$175.00=\$84,000.00
Danielle Joslyn: 900 Hours @ \$175.00=\$157,500.00
Fei Zou: 440 Hours @ \$175.00=\$77,000.00
Arisara Miller: 290 Hours @ \$175.00=\$50,750.00
Chris Fanikos: 300 Hours @ \$175.00=\$52,500.00
Dawn Webb: 30 Hours @ \$175.00=\$5,250.00
Ryan Wrisley: 50 Hours @ \$175.00=\$8,750.00
Jim Strassenburgh: 50 Hours @ \$175.00=\$8,750.00

Total: 4,080 Hours @ \$175.00=\$714,000.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$38,600.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-01	2023-02-28				

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

Extended Description:

Project Management Support Staff: Base Year One

Hourly Rate: \$80.00

Megan Blount: 402.5 Hours @ \$80.00=\$32,200.00

Jordan Ramsey: 10 Hours @ \$80.00=\$800.00

Karla Fossett: 10 Hours @ \$80.00=\$800.00

Carol Ann Guay: 10 Hours @ \$80.00=\$800.00

Caitlin Cabral: 10 Hours @ \$80.00=\$800.00

Bethany Pike: 10 Hours @ \$80.00=\$800.00

Emily Hendrickson: 10 Hours @ \$80.00=\$800.00

Molly Hawkinson: 10 Hours @ \$80.00=\$800.00

Jon Williams: 10 Hours @ \$80.00=\$800.00

Total: 482.5 Hours @ \$80.00=\$38,600.00



March 14, 2022

To Whom It May Concern:

BerryDunn submitted a Staffing Plan and Scope of Work (SOW) document to the Department of Health and Human Resources, Bureau for Medical Services (BMS), to provide assistance in implementing the Data Improvement Project – Phase 3 services, under our contract (HHR 21*3). As stated in the SOW document, the duration of this work is estimated to be ten months. BerryDunn agrees to a SOW start date effective on or after May 1, 2022. The work would then conclude on February 28, 2023.

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

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

Best Regards,

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

Eduardo G. Daranyi
Principal
207-541-2244



**Staffing Plan and Scope of Work for the
West Virginia Bureau for Medical Services
Data Improvement Project – Phase 3
Prepared for CMA #HHR21*03—Final**



Submitted by:

Nicole Becnel, PMP®, Principal
Eduardo Daranyi, PMP®, Principal
Jim Highland, PhD, Principal
Berry Dunn McNeil & Parker, LLC
300 Capitol Street
Charleston, WV 25301
Phone: 207-541-2244
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Submitted on:

March 14, 2022

berrydunn.com

**Staffing Plan and Scope of Work (SOW)
For the West Virginia (State) Bureau for Medical Services (BMS)
Data Improvement Project (DIP) – Phase 3 (Phase 3 DIP)**

This SOW describes the tasks BerryDunn will perform to assist BMS during the Phase 3 DIP. This SOW is henceforth referred to as the DIP – Phase 3 SOW.

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 Phase 3 DIP.

BMS has requested that BerryDunn continue providing assistance for the third phase of the DIP. Phase 1 of the DIP began on September 1, 2019, and ended on February 28, 2021. Phase 2 of the DIP built upon the analysis, findings, and deliverables from Phase 1 of the project and will conclude on February 28, 2022. For the Phase 3 DIP, BerryDunn will provide the following services: project oversight, project management, data and system analysis, data reconciliation, and Enterprise Data Solution (EDS) data profiling and validation activities.

The scope for the Phase 3 DIP will include:

- Continuation of data analysis and data reconciliation activities upon receipt of data extract submissions
- Continuation of Transformed Medicaid Statistical Information System (T-MSIS) support, as needed
- EDS data profiling and validation support

2.0 Assumptions

Time and cost estimates for this SOW are based on the following assumptions:

- Deliverables will be provided in an agreed-upon format.
- This work will begin upon approval of this SOW at a mutually agreed-upon date. This work is projected to continue for ten months.
- The State leadership team will consist of Fred Lewis (Deputy Commissioner, Plan Management and Integrity, BMS) as the project sponsor, and Tanya Cyrus (BMS Chief Quality and Integrity Officer) and Leon Smith (BMS Data Warehouse Specialist II, Office of Quality Management) as the BMS project leads.
- The BerryDunn leadership team will consist of Ed Daranyi, Nicole Becnel, and Jim Highland, who will provide engagement oversight; Andrea Clark and Peter Alfrey, who will provide program oversight; and Susan Chugha and Jeff Stoddard, who will serve as project leads.
- BerryDunn assumes the scope of the Phase 3 DIP is to assist BMS in improving the quality and usability of data contained in the State's Medicaid enterprise systems and associated decision support resources.
- Project documents—including meeting outcomes, action items, issues, risks, and decisions—will be on the Microsoft SharePoint project site and shared with and communicated to the BMS project sponsor and project leads during the project's duration.
- The State project leads, with support from the BerryDunn project team, will aim to provide timely decision-making and responses to information requests from State and/or vendor stakeholders.
- This SOW assumes that tasks to be completed by external entities (including other State agencies, vendors, federal contractors, and federal regulators) can be completed within the durations established in the initial Project Timeline and Schedule.
- This SOW assumes, with State approval, BerryDunn will be granted timely and adequate access to requested State Medicaid data, Medicaid Managed Care Organization (MCO) data, other Department of Health and Human Resources (DHHR) program data such as West Virginia Children's Health Insurance Program (WVCHIP) data, necessary to complete the objectives of this SOW.
- BMS intends to utilize the Medicaid Management Information System (MMIS) Implementation Advance Planning Document (IAPD) (formerly the MITA APD) for the purposes of 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

IAPDU. The estimated cost of the services to be delivered under this SOW is \$767,700 (included in the approved APD). Therefore, any additional scope that is 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.

3.0 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 the work; lists the estimated hours for completing each key task. Section 5.0 provides a high-level timeline for the activities described below.

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

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
1.0	<p>Engagement Oversight</p> <p><i>Service Approach</i></p> <p>BerryDunn's leadership team will oversee and coordinate BerryDunn staff, services, and deliverables.</p> <p>BerryDunn's project leadership will meet with the BerryDunn project lead and other key team members regularly to discuss project status and issues impacting timely completion of the project work and oversee BerryDunn staff, services, and review of deliverables.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> Deliverable 01: Commissioner Briefing <p><i>Completion Criteria</i></p> <p>Engagement Oversight will be deemed complete upon signature acceptance of the D06: Project Closeout Summary by the DHHR project sponsor or their designee.</p>	<p>Ed Daranyi</p> <p>Nicole Becnel</p> <p>Jim Highland</p> <p>Andrea Clark</p> <p>Peter Alfrey</p> <p>Dawn Webb</p>	80 hours
2.0	<p>Project Management</p> <p><i>Service Approach</i></p> <p>Upon project initiation, BerryDunn will conduct a kickoff meeting with key stakeholders to validate business process owners and State goals and objectives. Tasks will include:</p> <ul style="list-style-type: none"> Facilitating meetings, preparing meeting materials, and taking notes for BerryDunn- and State-owned meetings Preparing monthly project status updates, risks, issues, and briefings for the State leadership team Managing project logs (action item, decision, issue, and risk tracking) 	<p>Andrea Clark</p> <p>Peter Alfrey</p> <p>Jeff Stoddard</p> <p>Susan Chugha</p> <p>Megan Blount</p> <p>Jordan Ramsey</p> <p>Karla Fossett</p> <p>Emily Hendrickson</p> <p>Molly Hawkinson</p> <p>Bethany Pike</p> <p>Caitlin Cabral</p> <p>Carole Ann Guay</p> <p>Jon Williams</p>	100 hours

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none"> Storing project documentation repository in an agreed-upon SharePoint location <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> Deliverable 02: Monthly Status Report <p><i>Completion Criteria</i></p> <p>Project Initiation will be deemed complete upon successfully completing the D06: Project Closeout Summary.</p>		
3.0	<p>Analysis and Assessment</p> <p><i>Service Approach</i></p> <p>BerryDunn will perform the following tasks to execute activities under the Phase 3 DIP:</p> <ul style="list-style-type: none"> Intake of MMIS raw Electronic Data Interchange (EDI) data Intake of MMIS extract data Intake of DW/DSS data Data profiling, analysis, and reconciliation activities including communication of discrepancies to vendor(s), review of vendor responses/process corrections, summarization of vendor process issues producing data discrepancies, and resolution status <p>BerryDunn will perform the following tasks to assist activities aligned with phase 1 (data warehouse) of the EDS:</p> <ul style="list-style-type: none"> EDS data profiling and data quality validation Process improvement recommendations and data quality remediation strategies More details related to these activities can be found in Appendix A. <p><i>Deliverables</i></p> <ul style="list-style-type: none"> Deliverable 03: Data Reconciliation Report Deliverable 04: Data Profiling Findings Report Deliverable 05: Data Profiling Biweekly Activity Report <p><i>Completion Criteria</i></p> <ul style="list-style-type: none"> Analysis and Assessment phase will be 	<p>Jim Highland Andrea Clark Peter Alfrey Jeff Stoddard Susan Chugha Arisara Miller Fei Zou Lloyd Butler Danielle Joslyn Christopher Fanikos Ryan Wrisley Jim Strassenburgh Megan Blount Jordan Ramsey Karia Fossett Emily Hendrickson Molly Hawkinson Bethany Pike Caitlin Cabral Carole Ann Guay Jon Williams</p>	4,412.5 hours

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	deemed complete upon submission and approval of the Deliverable 03: Data Reconciliation Report, Deliverable 04: Data Profiling Findings Report, and Deliverable 05: Data Profiling Biweekly Activity Report		
4.0	<p>Project Closeout</p> <p>BerryDunn will prepare the Deliverable 06: Project Closeout Summary that includes an inventory of project documentation and deliverables to BMS at project close.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> Deliverable 06: Project Closeout Summary <p><i>Completion Criteria</i></p> <p>BerryDunn services will be considered complete when the State project sponsor or their designee formally accepts and signs Deliverable 06: Project Closeout Summary.</p>	<p>Andrea Clark</p> <p>Peter Alfrey</p> <p>Jeff Stoddard</p> <p>Susan Chugha</p> <p>Megan Blount</p> <p>Jordan Ramsey</p> <p>Karla Fossett</p> <p>Emily Hendrickson</p> <p>Molly Hawkinson</p> <p>Bethany Pike</p> <p>Caitlin Cabral</p> <p>Carole Ann Guay</p> <p>Jon Williams</p>	30 hours
Total Hours			4,622.5
Total Not-To-Exceed Cost Estimate			\$767,700

4.0 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) for Year 1 in CMA #HHR21*03.

Table 2: Project Resources

CL Year 1	Role	Rate	Project Resources	Total Est Hours	Total Est Cost
1	LPM	\$215	Ed Daranyi	20	\$4,300
2	EM	\$270	Nicole Becnel	40	\$10,800
4	GPM	\$175	Jim Highland	40	\$7,000
4	GPM	\$175	Andrea Clark	200	\$35,000
4	GPM	\$175	Peter Alfrey	100	\$17,500
4	GPM	\$175	Jeff Stoddard	900	\$157,500
4	GPM	\$175	Susan Chugha	300	\$52,500
4	GPM	\$175	Lloyd Butler	480	\$84,000
4	GPM	\$175	Danielle Joslyn	900	\$157,500
4	GPM	\$175	Fei Zou	440	\$77,000
4	GPM	\$175	Arisara Miller	290	\$50,750
4	GPM	\$175	Chris Fanikos	300	\$52,500
4	GPM	\$175	Dawn Webb	30	\$5,250
4	GPM	\$175	Ryan Wrisley	50	\$8,750
4	GPM	\$175	Jim Strassenburgh	50	\$8,750
5	SS	\$80	Megan Blount	402.5	\$32,200
5	SS	\$80	Jordan Ramsey	10	\$800
5	SS	\$80	Karla Fossett	10	\$800
5	SS	\$80	Carol Ann Guay	10	\$800
5	SS	\$80	Caitlin Cabral	10	\$800
5	SS	\$80	Bethany Pike	10	\$800
5	SS	\$80	Emily Hendrickson	10	\$800
5	SS	\$80	Molly Hawkinson	10	\$800
5	SS	\$80	Jon Williams	10	\$800
			Total Hours:	4622.5	\$767,700

EM = Engagement Manager
LPM = Lead Project Manager
GPM = General Project Manager
SS = Support Staff

5.0 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:

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

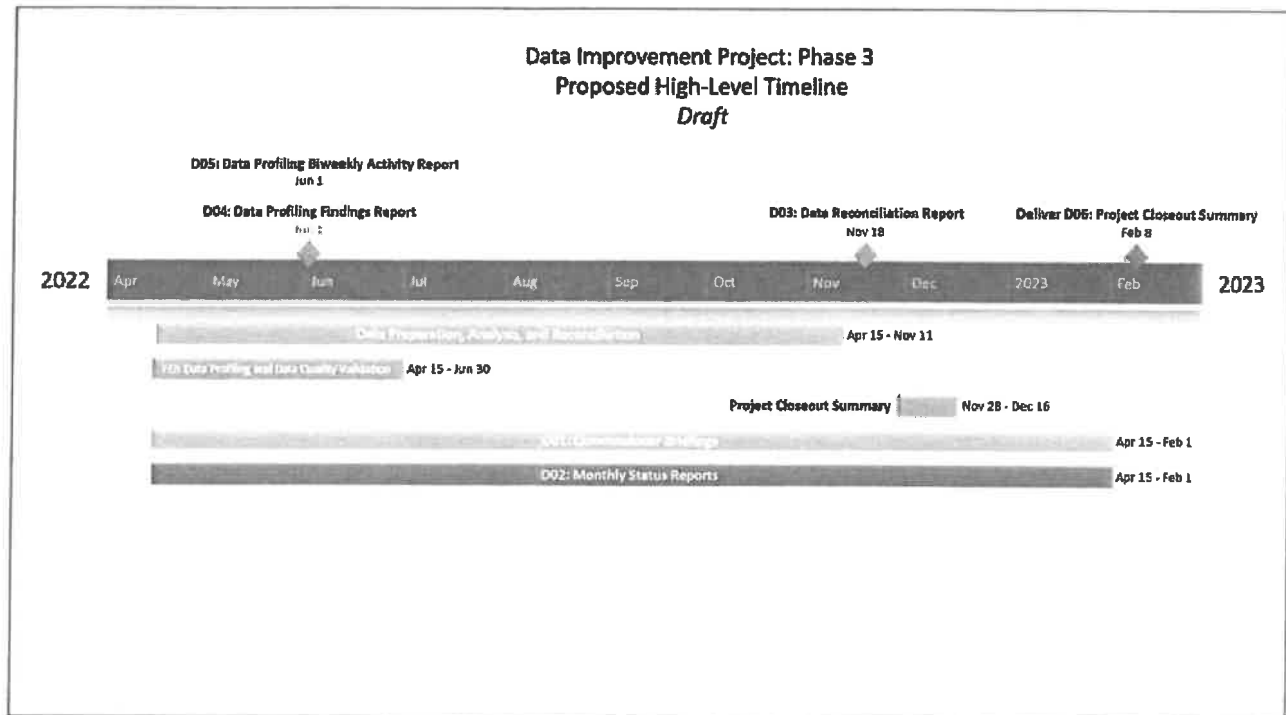
Table 3: Project Costs by Month

Month	EM Hours	LPM Hours	GPM Hours	SS Hours	Estimated Hours per Month	Estimated Cost per Month
Month 1	4	2	592	48.5	646.5	\$108,990
Month 2	4	2	592	48.5	646.5	\$108,990
Month 3	4	2	587	48.5	641.5	\$108,115
Month 4	4	2	347	48.5	401.5	\$66,115
Month 5	4	2	327	48.5	381.5	\$62,615
Month 6	4	2	327	48	381	\$62,575
Month 7	4	2	327	48	381	\$62,575
Month 8	4	2	327	48	381	\$62,575
Month 9	4	2	327	48	381	\$62,575
Month 10	4	2	327	48	381	\$62,575
Total	40	20	4,080	482.5	4,622.5	\$767,700

6.0 High-Level Timeline

Figure 1, below, illustrates the proposed high-level timeline for planning activities.

Figure 1: Proposed High-Level Timeline



BerryDunn Authorized Signature

As a principal of this firm in our Government Consulting Group, I have reviewed this SOW and am legally authorized to commit BerryDunn to the work as described herein. The work and level of effort is a not-to-exceed cost. Work to be invoiced to 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.



March 14, 2022

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.Lewis@hawaii.gov C = AD O = DHHR OU =
Integrity Plans Management
Date: 2022.04.05 13:48:59 -05'00'

04/05/2022

Signature

Date

Appendix A: EDS Data Profiling/Data Quality Validation Key Details

Based on a December 22, 2021, email communication with BMS, DIP, and EDS project discussions with the State and the planning meeting on January 21, 2022, with BMS, BerryDunn has outlined data profiling/data quality validation services to support the EDS project. BerryDunn will collaborate with the BMS sponsors and project leads to assist phase 1 (data warehouse) of the EDS project with data profiling and data quality validation activities, which include, but are not limited to:

- Generating a key findings data quality document, D04: Data Profiling Findings Report, replicating the BerryDunn methodology and format of the DIP phase 1 results. The results will adhere as closely and as accurately as possible to the original phase 1 BerryDunn methodology of data extraction and tabulation that used data from DataProbe and Advantage Suite. BerryDunn analysts will document key aspects of each EDS field and, at a minimum, include:
 - High importance indicator derived from the DIP phase 1 key findings.
 - Field population rates broken out by MCO and FFS.
 - Document values that indicate “missing” records as well as other “unknown” or “no data” type values. BerryDunn analysts will note changes identified.
 - Data differences between the current DW/DSS and the EDS (e.g., adding preceding zeros to make entries exactly five digits).
 - DW/DSS data will be pulled from DataProbe.
 - EDS data will be accessed in the UAT environment through SQL and/or possibly Cognos if available, and if that is the best tool to be used for this effort.
 - A frequency value distribution of fields that shows each value's total occurrences within the given field.
 - If applicable, an analysis of new data loaded into the EDS UAT environment after the initial key findings are complete.
- Assisting with investigation of exception reports generated by the IBM® EDS Extract, Transform, and Load (ETL) processes.
- Identifying root causes for problematic areas to assist with correcting them before the end of UAT.

- This task will require regular communications and remediation efforts with Gainwell and potentially the MCOs.

Appendix B: Resumes

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:	<p>Master of Education, Lesley College</p> <p>BS, Physics, Mathematics, and Business Administration, Hillsdale College</p> <p>Certified Project Management Professional®</p> <p>Systems Engineering Development Program, Electronic Data Systems</p>

Overview

Ed is a principal at BerryDunn with 20 years of experience managing and providing quality assurance (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 Medicaid Management Information System (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 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; West Virginia Children's Health Insurance Program (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 quality assurance 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 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 (MESOC) 2014, 8/19/2014

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 SS-A; and other related initiatives.
 - *Project Management of MMIS Procurement, DDI, and Certification (12/2012 to 09/2013).*
Nicole served as a project manager for the DDI of the Molina HealthPAS MMIS. Her work on the project included oversight of contract start up activities and system design sessions. She was responsible for managing the project team and providing oversight of the start-up and analysis/design activities.
 - *Provider Enrollment (PEA) Project (07/2011 to 12/2012).*
Nicole supported the Bureau with her project, program and portfolio management and subject matter expertise as they implemented health care reform. This work included implementation of provider enrollment screening requirements for various provider classifications to reduce potential fraud and abuse. Nicole also assisted with provider outreach activities including presentations and training at Provider Workshops held throughout the state.

- *5010 Refresh Project (10/2011 to 08/2013).*
Nicole served as project manager for the successful implementation of the 5010/D.0 standards required by federal mandate. In this role, Nicole supported the Bureau with her project management and subject matter expertise during the conversion of HIPAA Accredited Standards Committee (ASC) X12 version 4010A1 to ASC X12 version 5010 and National Council for Prescription Drug Programs (NCPDP) version 5.1 to NCPDP version D.0. This work included project management of deliverable review, SME advisory services, UAT plan assistance, operational readiness assessment, and post implementation project management and monitoring.
- *Data Warehouse / Decision Support System (DW/DSS) Project Management (06/2010 to 06/2011).*
Nicole served as the project manager to assist the State with the development of procurement documentation for the DW/DSS re-procurement. In this role, Nicole was responsible for managing the project team, serving as liaison with the Bureau, reviewing project deliverables, and providing subject matter knowledge and support.
- **New Jersey Division of Medical Assistance and Health Services – MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 01/2018).**
As Engagement Manager, Nicole oversaw the BerryDunn team working in collaboration with the New Jersey Implementation Team Organization (ITO) for the Replacement MMIS (R-MMIS). In her role, she was responsible for the oversight of the Leverage and Reuse, Testing and Certification project activities.

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

- **Project Manager for MIHMS Provider Enrollment.** Nicole served as Project Manager and SME for the Maine DHHS provider re-enrollment and maintenance implementation project, which created an online tool for enrollment, re-enrollment, and maintenance for Maine's provider community consisting of approximately 8,000 providers. Nicole managed large and complex configuration projects and provided expertise to other implementation initiatives, including conversion, reporting, and interface development.
- **West Virginia MMIS.** Nicole managed the development, implementation, and evaluation of quality management and risk management activities to ensure project compliance with all budget, time and quality specifications to assure client requirements across the Medicaid Enterprise. In her role, Nicole successfully project managed the on-time delivery of the NPI initiative in an accelerated time frame, successfully provided on-site support to BMS during the CMS certification evaluation; facilitated best practice cross communication; and, met customer expectations by monitoring, evaluating and assigning corrective actions.
- **Contract Configuration and Reports Lead for West Virginia MMIS.** Nicole developed, implemented, and documented processes and standards to ensure successful completion of reports. Additionally, she analyzed business processes to

transition the configuration to meet the current application. Working with the client, Nicole identified required changes and ensured issues were identified, tracked, reported and resolved in a timely manner. She was also responsible for creating a MITA Report Card and Trending Analysis Report tracking deliverables and report progress.

- **Project Management Support.** Nicole served in a project management support services role for State Medicaid initiatives including the Kentucky MMIS DDI project, which included schedule management, action item management, training support, provider development, and UAT planning. She also ensured the appropriate project organization processes were closely followed.

Presentations

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

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

James P. Highland, PhD

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Principal (employed with BerryDunn via Compass Health Analytics, Inc. since 1997)
Years of Experience Relevant to Proposed Role:	20+ years
Certifications and Education:	Ph.D., The Wharton School, University of Pennsylvania, Health Economics/Health Finance MHSA, The University of Michigan, Health Services Administration, Finance BA, Northwestern University, Economics, with Honors

Overview

Jim is a health economist with a background in health administration and insurance, and a principal in BerryDunn's Government Consulting Group. He has over 30 years of experience advising policymakers and nonprofit healthcare executives on issues related to healthcare financing, coverage, benefits, contracting, risk assumption, provider payment, and data warehousing/analysis. As former president and founder of Compass Health Analytics, Inc. for 20 years, he built the team of actuaries, economists, and data management professionals that have now become BerryDunn's Health Analytics Practice Area. Jim and his team have done in-depth financial, actuarial, and data analytics work on the costs of health coverage, population-based pricing related to ACOs, risk-sharing arrangements, design of alternative payment arrangements, Medicaid managed care, behavioral health/physical health integration, and transparency in commercial insurance markets.

Prior to founding Compass Health Analytics, Inc. in 1997, Jim worked at the University of Pennsylvania's Leonard Davis Institute, where he conducted research for Centers for Medicare & Medicaid Services (CMS) on provider payment methods, the American Hospital Association's Office of Public Policy Analysis, and Blue Cross Blue Shield of Massachusetts. During his career, he has worked with and for researchers, policymakers, insurers, and providers, and combines an ability to advise senior executives in system visioning and leadership with a mastery of the technical financial and information technology skills necessary to lead a team in detailed design and implementation.

Relevant Experience

BerryDunn (formerly Compass Health Analytics) (1997 to present). Jim designs and conducts research and analysis of complex healthcare data for issues related to pricing, rate setting, contracting, and strategic planning for public and nonprofit risk-bearing healthcare organizations, with an emphasis in Medicaid managed care programs, behavioral health, state-level insurance regulation, and health insurance coverage expansions.

Abt Associates Inc. (1994 to 1997). As a senior associate in the Health Economics Consulting Group, Jim directed and conducted research and analysis related to a variety of provider payment and insurance issues, including financial/risk modeling, capitation pricing, risk and incentive arrangements, physician fee schedule development, and managed care strategy. Clients included major insurers, HMOs, major provider organizations, pharmaceutical companies, medical societies, and state and federal agencies.

Blue Cross Blue Shield of Massachusetts (1993 to 1994). Jim served as the director of Research, Planning, and Evaluation related to hospital and physician contracts, including managed care risk sharing arrangements. He conducted planning for provider network development, and also designed and managed a project for resource-based relative value scale implementation.

American Hospital Association (AHA) (1990 to 1993). Jim served in various capacities with the AHA.

- **Director, Division of Economic Studies.** Directed a staff of five in conducting impact studies, research studies, and other analyses critical to the association's public policy activities. Provided economic research perspective in key association policy discussions. Primary focus on issues related to federal health reform and provider payment issues.
- **Associate Director, Division of Financial Policy.** Managed policy development and analysis for over 5,000 member hospitals on physician payment and hospital outpatient payment issues. Supported representation and member education with issue papers, Congressional testimony, regulatory comment letters, and presentations to member and other professional groups. Selected for Federal advisory groups related to outpatient payment issues.

University of Pennsylvania (1988 to 1990). Jim's roles with the University included:

- **Senior Investigator, Leonard Davis Institute of Health Economics.** Proposed successfully for a grant from the Health Care Financing Administration to study physician investment in diagnostic testing equipment. Designed valuation-based model to assess fees for diagnostic tests. Managed research process, staff, and budget.
- **Instructor: The Wharton School.** Assisted teaching "Financial Management of Health Institutions" to second year healthcare MBA students. Customized valuation software for hospital applications and instructed students in its use. Taught "Health Economics" to junior and senior undergraduates.

Andersen Consulting (1985 to 1987). As a senior management consultant, Jim managed and coordinated over 150 client personnel in successful user testing of large financial information system at a major university teaching hospital. Additionally, he designed a testing approach and automated testing control system, coordinated and facilitated interactions between client and software vendors in customizing basic software, and led training sessions for hospital personnel.

Sisters of Mercy Health Corporation (1984 to 1985). Jim was an administrative fellow, designing and successfully implementing a capital budgeting system at a 530-bed teaching hospital. He developed and launched a corporate structure for hospital-physician joint ventures, guided the management and budgetary process for the Department of Surgery, and evaluated requirements and wrote proposal for initiating financial planning function at the system holding company.

Andrea L. Clark, MS, Prosci® CCP

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Manager (employed with BerryDunn via Compass Health Analytics, Inc. since 2002)
Years of Experience Relevant to Proposed Role:	20+ years
Certifications and Education:	MS, The University of Wisconsin, Economics BSFS, The Edmund A. Walsh School of Foreign Service, Georgetown University, Economics, <i>magna cum laude</i> , Phi Beta Kappa Prosci® Certified Change Practitioner

Overview

Andrea is an experienced consultant with expertise in developing and implementing economic, statistical, and financial analyses in the healthcare field, including extensive experience designing, managing, and analyzing large, complex databases. Prior to joining BerryDunn, Andrea was a consulting economist for a Big Five consulting firm, conducting projects ranging from litigation support for a pharmaceutical firm to assessing treatment effectiveness for the federal Substance Abuse and Mental Health Services Administration. With BerryDunn's Health Analytics Practice Area, she develops and performs complex financial analyses of healthcare data, including managed care pricing, quality, and care management studies.

Andrea has been building a deep and wide-ranging expertise in behavioral health data and finance issues since 2002. She has extensive experience programming HEDIS and IPRO quality measures in the behavioral health environment, developing capitation rate bids, and building, implementing, and maintaining episode of care logic in multimillion record behavioral health claim databases.

Relevant Experience

BerryDunn (formerly Compass Health Analytics) (2002 to present). Andrea conducts quantitative research on various healthcare topics, with a primary focus on behavioral health in the public sector and topics in healthcare reform. She oversees preparation of Medicaid managed care capitation rate bids for clients covering over 800,000 combined lives, including coordinating clinical and actuarial input; performs complex financial and quality assessment analyses on health insurance claims and other client data; and manages programming staff in monthly production of multi-million record data warehouse for a managed care organization and production of inputs to actuarial analysis.

PricewaterhouseCoopers LLP (1997 to 2002). Andrea's positions with PricewaterhouseCoopers included:

- *Senior Associate:* Developed and implemented economic, statistical, and financial

analyses in a variety of fields, including healthcare and consumer credit. Managed multiple-track analyses of opposing party data. Supervised staff in implementing complex analyses.

- *Associate:* Responsible for management and analysis of large databases. Developed and implemented econometric analyses of outcomes in employment discrimination, fair lending, and anti-trust matters.

Klemm Analysis Group, Inc. (1996 to 1997). As an economist, Andrea performed data management and analysis for litigation support and government clients, including analysis of the National Household Survey on Drug Abuse for the Substance Abuse and Mental Health Services Administration.

Peter Alfrey, PMP®, Prosci® CCP

Proposed Project Role:	General Project Manager – Program Manager
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

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 Bureau for Medical Services, Peter brings a wide-range of 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 BMS**
 - *EPMO (09/2018 to present).*
Peter provides strategic direction for BerryDunn's EPMD team and for specific DHHR/BMS projects in the areas of project management best practices; process improvement; project staffing and recruiting; project funding and APD development; and research and tracking of industry trends to support current and future EPMD projects. In addition, he is the program manager for the EPMD's managed care organization (MCO) and data/analytics programs providing program oversight. EPMD 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 Medicaid Management Information Systems (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 / Mountain Health Promise (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 (AVS) Project Management Services and Procurement Assistance (04/2017 to 02/2018).*

Peter served as project manager for the AVS project that supported the State's objective of procuring AVS-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 user acceptance testing (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 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 Centers for Medicare & Medicaid Services (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 (GMCB) – 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 GMCB 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) – IV&V 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 (MESC), 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 MESC 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

Jeff Stoddard

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consulting Manager (employed with BerryDunn since 12/2019)
Years of Experience Relevant to Proposed Role:	15 Years
Certifications and Education:	BS, Management of Information Systems, University of Vermont Health Leadership Development Program, Daniel Hanley Center for Health Leadership

Overview

Jeff is a proven strategic technology leader with a strong track record managing complex projects and dynamic data processes involving both Medicaid and commercial data submitters. A creative, collaborative leader in demanding situations, he excels in interacting with diverse stakeholders, building consensus, and developing successful working relationships. In all his projects, Jeff maintains a keen focus on customer satisfaction, operational excellence, and delivering business value.

Relevant Experience

Onpoint Health Data (08/2013 to 07/2019). As Onpoint's chief information officer, Jeff was a member of the senior leadership team driving both the strategic direction of the company and day-to-day operations, leading technology functions including infrastructure, systems development, and data security.

- **Medicaid claim data intake and quality assurance.** Throughout his six-year tenure at Onpoint, Jeff oversaw data intake and processing for eight state all-payer claim databases (APCDs) including Medicaid data. He partnered with state Medicaid agencies and Medicaid managed care organizations in eight states to help ensure compliance with claim, eligibility, and provider data submission and quality requirements.
- **Enterprise data processing transformation (cloud migration).**
 - Developed the business case to move all data processing to a distributed computing model in the cloud; gained unanimous support from leadership.
 - Achieved twenty-fold increase in processing speed (65 million records processed in less than three hours vs. three days).
 - Led the development of an enhanced user interface to increase internal operational efficiency and an enhanced external user experience.

- **Modernized information technology infrastructure.** New technology infrastructure and data center led to higher employee productivity and successful security audits.
 - Developed the business case and budget to procure more modern, secure, and faster technology infrastructure.
 - Developed and implemented new technology infrastructure project plan, collaborating with both internal staff and vendors.
 - Enhanced data security by moving all infrastructure to a modern data center.
- **Development and implementation of a more robust information security program.** Resulted in achievement of HITRUST security certification, the gold standard security certification in the healthcare industry.
- **Implemented an Agile Scrum methodology to achieve consistency and transparency in project management across the organization.** There was a need for tracking and documenting work requests from internal and external customers and for transparency.
 - Implemented Agile Scrum for managing software development projects, which resulted in more empowered, cohesive teams as well as transparency across the business.
 - Implemented Jira®, a cloud-based task management tool for tracking all work requests, which led to improved requirements documentation and workflow.

Arcadia Solutions (04/2012 to 07/2013). As a principal consultant for Arcadia Solutions, Jeff led and managed multiple projects and teams to transform the data warehouse and business intelligence capabilities for a community health network in the State of Washington, building an integrated claims and clinical data warehouse with a user interface to be used for population health management.

Health Dialog (09/2004 to 04/2012). As senior director of Operations for Health Dialog, Jeff led a large team of developers, quality assurance analysts, and business analysts responsible for the acquisition, transformation, and quality of healthcare data from many of the largest health plans in the United States. This data was used to drive the disease management function of the business.

Susan Chugha, Prosci® CCP

Proposed Project Role:	General Project Manager – Project Lead
Role at BerryDunn:	Senior Consultant (employed with BerryDunn since 10/2016; subcontractor to BerryDunn beginning 10/2015)
Years of Experience Relevant to Proposed Role:	14 years
Certifications and Education:	MLC Certified Medicaid Professional (MCMP-II) Prosci® Certified Change Practitioner BA, Business Management, Belmont Abbey College

Overview

Susan has over 10 years of administrative management experience, as well as five years' experience in consulting work. She has excellent organizational skills, experience with research and project coordination, and experience with various scheduling programs.

Relevant Experience

BerryDunn (10/2015 to present). Susan works with State Medicaid Agencies, focusing on project coordination and support. She began with BerryDunn as a subcontractor through TEKsystems in 2015 before joining the firm full-time in October of 2016.

- **West Virginia BMS.**
 - *Substance Use Disorder (SUD) Waiver Initiative Project (10/2016 to present).*
As project manager for phase 3 of the SUD waiver initiative, Susan is responsible for providing oversight to the project team. She is responsible for the day-to-day activities, meeting facilitation, monitoring progress against the agreed-upon project summary and schedule, as well as deliverable review. She performs research on SUD services, CMS requirements, and State policies and procedures to support the waiver activities. Before becoming the project manager, Susan was project coordinator for phases 1 and 2. As project coordinator, Susan was responsible for project coordination, which included client outreach, scheduling, notetaking, research, and business analysis. During phase 2 she managed the development of a peer recovery support specialist webinar and has been involved in policy development.
 - *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (10/2016 to present).*
Susan moved into the project manager role in November 2019 for the MITA 3.0 2018 SS-A maintenance and annual update project. She is responsible for providing oversight to the project team, managing budgets and project deliverables, as well as working closely with the client to help ensure requirements and expectations are fully met. Prior to this role, Susan was the

lead project coordinator for daily project activities, responsible for project communication, quality checks on files and templates, and meeting management. She also assisted with the maintenance and management of the MMP site which included uploading files, updating relevant information as needed, ensuring that the appropriate individuals are granted access, and contributing to the design of dashboards and all other aspects.

- *Children with Serious Emotional Disorder 1915(c) HCBS Waiver (CSEDW) (09/2018 to 12/2018).*

As the project coordinator, Susan was responsible for project coordination, which included client outreach, scheduling, notetaking, document review, research, and business analysis. Susan also coordinated and executed multiple public forum events throughout the State of West Virginia.

- *ICD-10 Transition Planning and Implementation (10/2015 to 02/2016).*

Susan was responsible for meeting management, as well as maintenance of the document repository for the project. In addition, she attended policy review and workgroup meetings.

Independent Consultant (08/2010 to present). Susan currently works with her clients to help with event planning, maintaining calendars and contact lists, managing correspondence as well as service provider relationships, scheduling of both professional and personal appointments, and making travel arrangements.

Columbia Management (09/2012 to 10/2013). As a scheduling coordinator and administrative assistant, Susan partnered with five regional wholesalers within the U.S. to manage territory rotation for external wholesalers, schedule daily financial advisor meetings and handle reschedules, coordinate local client events, process monthly expense and activity reports, and complete as-needed ad hoc assignments.

Evergreen Investments (06/2004 to 05/2009). Susan served in multiple roles for Evergreen Investments:

- **Project Specialist – Assistant Vice President**

- Lead Project Specialist for semi-annual Global Distribution Summits.
- Coordinated all logistics for Asset Management Distribution Group to participate in the Wachovia Championship.
- Lead Project Specialist for annual client event that hosted over 1600 Industry leaders and their families. We had ~\$1.5 trillion dollars in assets under management represented in our client base at this event.
- Partnered with Training & Development team to coordinate internal training programs (on-boarding, sales training, negotiation skills, product training) all around the U.S. and assisted with follow-up after each program to track our successes and determine where improvement was needed.

- Managed the relationship between the portfolio managers/specialists and wholesalers to coordinate communication inquiries and field travel opportunities.
- Partnered with Broker-Dealer National Sales Managers to coordinate divisional meetings and drive sales efforts.
- Managed special projects and events assigned by the President of Evergreen Investments Services Inc. (EISI) and other members of the executive leadership team.
- **Communications Coordinator/Project Manager – Officer**
 - Created quarterly newsletters and other publications that were distributed internally.
 - Coordinated the Mutual Funds, Sales and Operations (MFSO) program for wholesalers.
 - Managed the valued-add and continuing education curriculums that were available to field wholesalers.
 - Partnered with Learning and Development Managers to assist in coordination of training programs and on-boarding for new internal and external Wholesalers.

Bank of America Capital Management (formerly Nations Funds) (04/2001 to 05/2004).

Susan served as an executive administrative assistance and office manager, supporting both the Managing Director of Global Distribution and the Director of Internal Sales. Her administrative duties included answering phone calls, scheduling meetings, book travel arrangements, process expense reports, minute taking & distribution, coordination of meetings and conferences for office professionals. In addition, she created PowerPoint presentations, monthly reports, territory maps, emergency contact lists, etc.; organized and scheduled internal trainings and maintained relationships with business partners; and maintained office and office equipment that supported over 50 associates.

Lloyd Butler

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant (employed with BerryDunn since 12/2020)
Years of Experience Relevant to Proposed Role:	16 years
Certifications and Education:	MS, Mathematics, Northeastern University BS, Mathematics/Computer Science, Ithaca College

Overview

Lloyd is an organized IT professional with diverse experience, including cybersecurity, efficient programming, process and project management, who enjoys designing and orchestrating a shared vision.

Skills

Applications: SQL Server Management Studio, Sisense, Git, Asana, Jira, Slack, Okta, SharePoint, Microsoft Office, Microsoft Visual Studio .NET

Languages: SAS, SQL, Python, Bash, PL/SQL, Perl, JavaScript, CSS, HTML, XML, VBScript (Active Server Pages), Visual Basic, VB for Applications, Java, C++, C#

Relevant Experience**High Value Healthcare Collaborative (HVHC) (04/2013 to 12/2020)**

- **Infrastructure Manager.** As the senior manager of IT operations, Lloyd was responsible for server environment stability and security. He served as the technical liaison to data centers (Dartmouth College, Rackspace); maintained all server-based software installations; served as the administrator for Sisense, SAS, and SharePoint; and managed the change control board, including evaluating and approving application and infrastructure changes.
- **Information Security Officer.** Lloyd managed external vendors to conduct security assessments, audits, penetration testing, and other activities necessary to secure HVHC data. He oversaw the implementation of security improvements to maintain strict CMS requirements, developed the security plan and related documents, and trained users on security best practices.

Lloyd also served as a senior programmer and analyst, user support lead, and user support analyst during his tenure with HVHC.

Northern New England Accountable Care Collaborative (07/2012 to 06/2015). As the lead programmer and technical liaison, Lloyd handled a wide variety of IT, analytic, and business tasks to support start-up from the onset. He worked closely with consultants to implement new web-based patient care product, managed technical relationships with multiple clients and

vendors, provided day-to-day technical and user support for co-workers, and worked with Leadership Team to legally wind down the organization.

Health Dialog (09/2005 to 06/2012). Lloyd served as the primary programmer and technical liaison to help start up the Northern New England Accountable Care Collaborative. He was the primary designer and programmer of a Physician Performance Measurement System (PPMS), responsible for bi-monthly PPMS releases (testing, change request management, rollout). He executed PPMS to generate reports for Maine Patient Centered Medical Home programs, documented PPMS and presented technical aspects of PPMS to company departments, implemented HEDIS and proprietary measures for use by PPMS, and worked with Operations team to make HEDIS measures available company wide.

Anteon (07/2003 to 09/2005). Lloyd analyzed, coded, and modified mathematical models for military use. He also served as a primary tester for large-scale military simulation and as a liaison between government customers and project team.

Erie Scientific (05/2000 to 06/2003). As a quality control consultant, Lloyd created and modified advanced Excel workbooks and Access databases to improve worker efficiency and assist with quality assurance. He trained users how to use these tools, wrote and tested validation suites for FDA controlled databases, and served as a remote help desk/consultant for various projects.

Danielle Joslyn

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant with BerryDunn since November 2021
Years of Experience Relevant to Proposed Role:	14 years
Certifications and Education:	Bachelor of Arts in Mathematics, University of Southern Maine

Overview

Danielle is an experienced healthcare data analyst and project manager with excellent data analysis and evaluation skills. She is highly skilled with the management of patient claim information, building data warehouses, and performing data analysis in SAS and Microsoft SQL based environments and has the proven ability to implement and manage multiple projects, while maintaining high quality standards and providing value-added service to the client. She has demonstrated leadership experience in team-based environments, as well as the ability to work independently, to develop new processes and strategies to meet client needs.

Experience

Cotiviti (October 2016 to November 2021). Danielle worked as a Senior Implementation Manager and Product Manager to coordinate and manage projects for new clients and existing client expansions, including maintaining project timeline, gathering project requirements, developing project plans and milestones, and performing data analysis on incoming client data. She developed queries to analyze client data to ensure the data meets product needs, maintained all Jira features/stories, and coordinated priority with the Retrospective Business. She participated in all program increment planning activities in an Agile team environment., coordinated internal resources for weekly checkpoints to ensure timely completion of project tasks, and developed standardized data analysis tools for the implementation team to perform data analysis and validation. Danielle also identified opportunities to streamline the implementation process and build standard client toolset, mentored Implementation Analysts on their assigned projects, and liaised for the implementation team with Research & Development, Operations, Data Management, Go-to-Market, and Product.

RxAnte (September 2015 to September 2016). Danielle worked as a Senior Software Developer to design and develop re-usable SAS and SQL code to standardize and analyze clinical information. She supported the Web Services team on development of front-end portal used by healthcare entities to achieve medication adherence, completed software development tasks, including analysis, design, implementation, documentation, and validation, and collaborated with business partners to define business requirements and specifications. Danielle provided information and support for ad hoc analytic projects for internal customers. She also performed data extractions from multiple claims data warehouse to meet project requirements.

Cotiviti/Connolly/iHealth Technologies (January 2012 to September 2015). Danielle worked in many roles including Associate Business Systems Analyst, Business Systems Analyst, Auditor, and eventually Senior Auditor to identify claim outliers and overpayments utilizing a variety of Cotiviti tools including trend analysis and outpatient and inpatient pricing. She developed new and existing audit concepts, gained client acceptance, trained all audit levels to execute audit projects and performed quality review of claim submissions. Danielle was responsible for the review of eligible claims to ensure claims were selected as intended for the specific concept and she worked with assigned Data Analysts to enhance or create reports to aid in overpayment identification. She also served as Subject Matter Expert on Internal tools and systems, mentored junior associates on Cotiviti tools and best practices, and provided day-to-day support to audit team members on query writing and concept development. She utilized understanding of SQL programming and data structure to identify and implement improvement opportunities in current processes and concepts. Danielle collaborated with business partners to understand how medical claim information should be reported and displayed in Access for day-to-day audit use. She participated in Design Sessions and Code Reviews, built and supported custom software solutions and analytics tools using Microsoft SQL Server, Access and Excel while providing team and cross-departmental training(s) on new Cotiviti tools or processes.

Health Dialog (February 2007 to January 2012). Danielle worked as a Senior Implementation Team Leader, Senior SAS Programmer Analyst and SAS Programmer Analyst to develop reusable SAS software to in-take, standardize, quality control, and analyze clinical information such as facility, professional, pharmacy, provider, and health survey insurance data. She advanced, documented, and communicated concepts, utilities, processes, standards, and procedures, while providing and implementing strategic ideas for improvement. Danielle worked alongside management to delegate tasks to team members, provided day-to-day support for programmers, and completed software development tasks, including analysis, design, implementation, documentation, and validation. She facilitated code reviews for code development, standardization, efficiency, and accuracy. Danielle was an active contributor to the hiring, coaching, goal setting and performance reviews of new employees, while working with existing team members to mature their software development skills, and business intelligence.

Fei Zou, MS

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Healthcare Analyst with BerryDunn since July 2021
Years of Experience Relevant to Proposed Role:	11 years
Certifications and Education:	<p>Bachelor of Science in Applied Mathematics, Tongji University</p> <p>Master of Science in Mathematical Science, University of Massachusetts Lowell</p> <p>SAS Certified Advanced Programmer for SAS 9</p>

Overview

Fei is an experienced analyst with more than 10 years' experience in the HealthCare industry, including nine years with a major New England Medicaid managed care organization (MCO). She is proficient in SAS, SQL, and Excel and is familiar with medical and pharmacy claims, HEDIS, CMS/NCQA/PQA measures, DRG and Risk Adjustment. She has developed her skills in learning quickly, multitasking, and working both independently and on a team.

Relevant Experience

BMC Health System (formerly HealthNet Plan) (August 2012 to July 2021). Fei worked as a health data analyst II, senior health data analyst, and senior medical economics analyst. She led the development and production of regulatory reports to MA EOHHS, NH DHHS, and CMS, including NCQA/PQA measures. She developed and analyzed monthly reports to identify high risk/high utilization members for care management. Fei supported strategic planning including risk adjustment and quality improvement initiatives. She created a results tracking dashboard for utilization trends, quality measure compliance, and care management operations for both internal and external clients. Fei also investigated unusual utilization trends, built and maintained a profitability database for an ACO model, and worked on the claim service categorization from the design phase to the UAT phases. She was responsible for code migration and impact analysis for the ICD9/ICD10 transition, as well as training for new hires.

Health Dialog (August 2010 to August 2012). Fei worked as an evaluation analyst to design and code models to estimate clinical outcomes and financial impact. She consulted with internal and external customers for an appropriate analysis plan and debugged, reviewed and wrote Standard Operating Procedures for SAS products.

Arisara Miller

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Manager (employed with BerryDunn since 06/2018)
Years of Experience Relevant to Proposed Role:	16 years
Certifications and Education:	MS, Economics, Oklahoma State University BS, Business Administration – Economics (Quantitative Statistics Studies), Oklahoma State University

Overview

Arisara is an experienced healthcare data analyst with over 18 years of experience working with healthcare institutions and insurance agencies across the country. Her expertise includes managed care organizations, Medicaid payment methodologies, claims-based algorithms, and data extractions.

Relevant Experience

BerryDunn (06/2018 to present). Arisara serves as part of BerryDunn's Health Analytics Practice Area as a manager, focusing on data analytics engagements with healthcare clients across the country.

Blue Shield of California (05/2017 to 05/2018). As a medical informaticist, Arisara designed and continually improved Tableau models to track cost of healthcare savings from initiatives such as ClaimXten clinical editing, spine surgery / pain management, and radiology pre-service authorization programs. She performed medical and payment policy analyses to inform the Medical Policy Impact Committee, enable new decisions, and evaluate ongoing practices. Other duties included document business requirements and designing data models to store post-service clinical review records in the new Enterprise data warehouse infrastructure, and serving as the team's Tableau Ambassador to establish and enforce best practice standards for server publishing, efficiency, and data visualization.

Boston Medical Center HealthNet Plan (07/2007 to 05/2017)

- **Medical Economics Principal (01/2014 to 05/2017).** Arisara led the development of numerous complex and time-sensitive analyses to support the CFO, Chief Actuary, and Vice Presidents. She analyzed data to support Medicaid payment method re-pricing, primary care physician attribution, and ACO contract strategy. Other tasks included fulfilling state reporting requirements for total medical expense and relative pricing, developing the quarterly medical expense dashboard, collaborating with IT to ensure data integrity and resolve issues, and guiding junior and senior analysts on SAS/SQL coding, enterprise reporting definitions, and best practices.
- **Senior Medical Economics Analyst (07/2007 to 11/2011).** Arisara tracked medical care expenses and utilization trends to inform senior management and influence key

decisions on budgeting and pricing projections. She created reporting packages to satisfy the needs of internal and external customers, conducted research with Medical Directors to build methodologies for identifying at-risk patients for telephonic outreach programs as mandated by state authority and corporate goals, prepared and presented ad-hoc analyses to support key corporate initiatives to improve care quality and reduce cost, and coordinated with IT to validate data quality and make recommendations on process and system improvements. Arisara was also responsible for writing project plans, business requirements, technical specifications, and analytic definitions, and for coaching staff on healthcare data, data warehouse structures, and the analytic tool being used.

- **Blue Shield of California (11/2011 to 01/2014).** With Blue Shield of California, Arisara built and enhanced analysis methods, data systems, and web-based reporting tools. As a medical informaticist, she critically reviewed existing processes to identify inefficiencies and potential problems, took actions to explore and implement solutions, and directly supported the Chief Health Officer, vice presidents, and directors to achieve corporate goals. She set up an automated interface to deliver daily data feeds from internal data marts to the case management system vendor to enhance member-level case management, and established and maintained a robust model to calculate savings from pre-service review activities and medical policies, which revealed significant cost reduction opportunities.

Harvard Pilgrim Health Care (06/2004 to 07/2007). As a business analyst for medical economics, Arisara designed and developed claim-based algorithms to pinpoint patients for internal disease management programs such as Oncology, End-Stage Renal Disease, High-Risk Pregnancy, and Cardiac. In addition, she was responsible for building and maintaining related registry records. She worked in partnership with Medical Management and Actuarial to develop the appropriate approach to calculating the return on investment for disease management programs, produced and summarized the key findings of ad-hoc strategic financial and budget projection reports, evaluated historical statistics and administrative information to pinpoint recent and prospective budgeting and pricing trend drivers, planned and implemented user acceptance testing procedures and SAS programming templates to validate the integrity of the new enterprise data warehouse and web-based reporting tools, documented and automated data mining and reporting processes to achieve consistency and efficiency, and provided SAS and general analytical training to other analysts.

BlueCross BlueShield of Massachusetts (05/2002 to 06/2004)

- **Finance Development Program for Audit and Controls (01/2004 to 06/2004).** Arisara completed operational and IT readiness assessments of new product development initiatives undertaken by the corporation. She performed ad-hoc data extractions and analyses to support internal and external audit services, and assisted the legal department to ensure that appropriate confidentiality agreements are in place before releasing any HIPAA-protected health information to external parties.

- **Analyst (05/2002 to 01/2004).** Arisara evaluated the financial and clinical effectiveness of Cardiac and Diabetes disease management programs. She oversaw data compilations and rate calculations for several NCQA HEDIS measures, co-wrote annual population-based analysis publications to present the top 20 medical conditions affecting insured populations, and studied and compiled claim and medical chart review data to secure the annual supplemental Medicare + Choice payments for the heart failure patient population.

CommunityCare of Oklahoma (05/2000 to 05/2002). As an analyst, Arisara extracted and analyzed healthcare data to satisfy the needs of internal and external customers. She constructed, updated, and maintained databases for various uses, such as NCQA HEDIS rate calculations, the pharmacy data warehouse, and the dental claims database. She also maintained reference tables to enable consistent and accurate reporting capabilities.

Dawn Webb, BSHL, CPC, COC

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Manager (employed with BerryDunn since 08/2017)
Years of Experience Relevant to Proposed Role:	9 years
Certifications and Education:	BS, Healthcare Leadership, Wheeling Jesuit University Associate in Applied Science, Office Administration, West Virginia University Certified Professional Coder, American Academy of Professional Coders Certified Outpatient Coder, American Academy of Professional Coders Certificate of Proficiency in Obstetrics/Gynecology Coding, American Academy of Professional Coders Certified Compliance Professional, Healthcare Fraud & Abuse Institute Certificate of Proficiency in Surgery Coding, American Academy of Professional Coders Certificate of Proficiency in Internal Medicine Coding, American Academy of Professional Coders

Overview

Dawn is a manager in BerryDunn's Medicaid Practice Area, with extensive experience in Medicaid billing, state Medicaid programs, worker's compensation claims, and rural health centers. She is a Certified Professional Coder and a Certified Outpatient Coder. Her experience includes working with clients on projects involving compliance guidelines, electronic health record (EHR) system implementations, QA, Health Insurance Portability and Accountability Act (HIPAA) policy, International Statistical Classification of Diseases and Related Health Problems-10 (ICD-10) coding, and patient management and claim editing system implementations.

Relevant Experience

BerryDunn (08/2017 to present). Dawn works with state Medicaid agency clients, currently serving on the project team based in Charleston, West Virginia.

- **West Virginia Bureau for Medical Services (BMS).**
 - *Enterprise Project Management Office (EPMO) (05/2019 to present).*
As quality improvement initiatives program manager, Dawn is providing project support in the areas of process improvement, best practices, and staffing allocations for the Fee Schedule and Edit Quality Review, Payment Error Rate

Measurement (PERM), and Third-Party Liability Procurement projects.

- *Advanced Planning Document Assistance (05/2018 to present).*
Dawn currently assists with the implementation and update of Advanced Planning Documents (APD) to support BMS in securing funding for projects. She provides assistance and oversight in compiling information for the APD, writing the APD, and developing the Medicaid Detail Budget Tables (MDBTs).
- *Payment Error Rate Measurement (PERM) Project (05/2018 to present).*
Dawn is serving as the project manager for the PERM project, managing budgets and project deliverables and working closely with the client to ensure requirements and expectation are met fully. This project includes validating errors, research error remedies, and providing oversight for resolution of PERM errors cited for WV.
- *MMIS Fee Schedule and Edit Quality Review (09/2017 to present).*
Dawn serves first as project subject matter expert (SME) and then as project manager. She works closely with the client to evaluate the MMIS fee schedules and claim edits to ensure MMIS setup is in compliance with Medicaid policy and to provide analysis of cost savings opportunities for BMS.

Valley Health Systems, Inc. (12/2009 to 07/2017). Dawn served as a manager responsible for revenue cycle administration and billing.

Unisys (06/2004 to 11/2009). As a domain services analyst, Dawn served as the configuration team leader and a medical coder for the West Virginia Medicaid line of business.

Charleston Area Medical Center (08/2004 to 09/2004). As a contracted medical coder, Dawn worked primarily with Charleston Area Medical Center's compliance department.

West Virginia University (WVU) Physicians of Charleston (06/2001 to 06/2004). While with WVU, Dawn worked as a senior billing specialist and a billing manager, serving the Department of Internal Medicine and the Department of Obstetrics and Gynecology.

University Health Associates (09/1996 to 07/2001). Dawn served in several roles with University Health, including a billing analyst, billing specialist, billing supervisor, and billing manager. She worked primarily with the Department of Obstetrics and Gynecology and the Family Medicine Center of Charleston.

Garnet Career Center (02/1999 to 01/2000). Dawn worked as a medical coding instructor for the career center.

Acordia National (12/1994 to 05/1996). Dawn began her career as a claims examiner.

Professional Affiliations

American Academy of Professional Coders, Local Chapter Secretary, 1999

Office Managers Association of Healthcare Providers, Vice President of Publicity, 2001

Chris Fanikos, MPH

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant with BerryDunn since November 2021
Years of Experience Relevant to Proposed Role:	6 years
Certifications and Education:	Bachelor of Arts in History and Middle Eastern & Islamic Studies, New York University Master of Public Health in Public Health Policy, Yale University

Overview

Chris is an experienced public health professional with experience in corporate, health care, and educational organizations. He has developed skills in research, data analysis, project management, and program development. He has worked with various data models to develop and understand data relating to Medicaid, health policy, and behavioral health.

Relevant Experience

University of Connecticut, Analytics & Information Management Solutions (AIMS) (January 2021 to November 2021). Chris worked as a Solutions Analyst to develop data pipelines using Microsoft Azure services (Blob storage containers, Azure Data Factory, Azure Databricks) and NextGen (Mirth) Connect for ingesting and parsing Medicaid beneficiary clinical data to analyze the impact of COVID-19 and State telehealth policies on healthcare utilization and clinical outcomes; ingested, parsed, cleaned, and profiled ~2.1 million Consolidated Clinical Document Architecture (C-CDA) files from Connecticut FQHCs. He designed and implemented analytic data models using ingested clinical data; developed interactive, dynamic Tableau dashboards using these models to meet stakeholder-defined analytic requirements, including time trend and geospatial analyses.

University of Connecticut, AIMS (August 2019 to January 2021). Chris worked as a Health Policy & Business Analyst to query extracts of the Connecticut All Payer Claims Database, including Medicaid claims, using Python and SQL to develop analytic data views. He developed dynamic, interactive dashboards in Tableau using these views. Chris also served as a lead business analyst for a variety of projects, including the establishment of the State's Health Information Exchange (HIE) and grant-funded research focusing on telehealth and behavioral health utilization during COVID.

Brigham & Women's Hospital, Division of Pharmacoepidemiology & Pharmacoeconomics (May 2018 to June 2019). Chris worked as a Research Trainee devise and conduct an independent research project relating to opioid and OUD treatment prescribing rates in Medicaid programs between 2008 and 2017. He scanned all 50 state legal codes for legislation on prescription drug monitoring programs, prescription limitations, and continuing medication education mandates; merged these data with Medicaid State Drug Utilization claims

data into longitudinal datasets. He ran multivariate regressions and interrupted time series analyses on prescribing and policy data sets in R/SAS; drafting the results of these analyses for publication in a major American public health journal.

HAVEN Free Clinic (December 2017 to February 2019). Chris worked as the Co-Director of Pharmacy to manage all aspects of the clinic's pharmacy, including maintaining the in-house formulary, overseeing medication dispensing, consulting with medical teams on cost-benefit decisions, and ensuring volunteer and patient satisfaction. He developed and conducted internal quality improvement projects on fill/delivery efficiency and medication adherence

Rennert International (August 2015 to August 2017). Chris worked as a Manager in Sales & Marketing to establish, maintain, and develop relations with over 500 vendors and business partners. He compiled and analyzed data on partner performance and market trends for use in product development.

Jim Strassenburgh

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant (employed with BerryDunn since 06/2014; subcontractor to BerryDunn beginning 02/2013)
Years of Experience Relevant to Proposed Role:	19 years
Certifications and Education:	BA, Philosophy, St. Lawrence University

Overview

Jim is a skilled senior consultant with BerryDunn's Government Consulting Group. He has over 20 years of IT experience and a rare combination of skills gained from working with large-scale systems architecture projects, serving as an operations technical lead for critical financial infrastructure on Wall Street, and founding a software development company to build high availability and DevOps products. Over the past five years, Jim has focused on healthcare systems, working with BerryDunn on several state Medicaid IV&V projects.

Relevant Experience

BerryDunn (02/2013 to present). With BerryDunn's Medicaid consulting practice, Jim has worked on the following projects. He began with BerryDunn as a subcontractor in 2013 before joining the firm full-time in June of 2014.

- **West Virginia Department of Health and Human Resources (10/2019 to present)**
 - *Enterprise Data Services and Data Source Program (01/2020 to present).*
Jim is concentrating on data governance for this large initiative and serves as an integration point between the PATH program data services and enterprise data services.
 - *PATH/IES Program (10/2019 to present).*
Jim is member of the State Program Management Office serving on the Document Review Team. As a team member, Jim reviews all program artifacts with concentration on operations, architecture, performance testing, and data governance components for the program.
- **Massachusetts HIX/IES Entities – IV&V Services (05/2014 to 09/2019).**
Jim served as IV&V technical lead for Massachusetts' HIX/IES implementation, with responsibility for CMS formal and boundary testing; blueprint testing; review and validation of major vendor releases; architecture review and other technical content; and engaging with vendors, senior Commonwealth leadership, and architects.
- **Maryland Health Benefit Exchange – IV&V for Maryland's HBE Implementation (02/2013 to 04/2014).**
As IV&V technical lead, Jim assessed technical aspects of Maryland's HIX/IES implementation, tracked progress, developed risks and issues, innovated traditional

IV&V work by creating deep-dive sessions and architecture flows, supported CMS attestations (reports) and Blueprint certifications, served as technical liaison, and worked to build strong relations across various stakeholders and vendors.

- **Missouri Department of Social Services – Missouri Eligibility Determination and Enrollment System (MEDES) IV&V Services.**

Jim conducted a systems architecture review of the MEDES reporting, including high-level infrastructure, data flows, and system artifacts. In addition, he reviewed IBM's systems architecture report, observed required testing activities, and provided feedback as part of the IV&V Monthly Report.

MetroSource, Corp. (1995 to 2012). Jim founded this hybrid consulting and software development company, providing systems architecture, data center virtualization, and business continuity services, including development of systems infrastructure documentation for performance engineering environment for Paychex and an after-hours trading system for Japan to support a high-volume retail equity trading system. Jim also designed and implemented high-availability architecture for AT&T's internet service, WorldNet.

Rochester Institute of Technology (01/2010 to 12/2011). Jim served as the enterprise project manager in building a shared services computing model and the construction of a new green data center facility for one of the largest private universities in the country. In this role, he developed new service processes and chargeback models based on shared services; developed formal RFIs and RFPs; provided budgeting and financial modeling, including return-on-investment assessments; developed a disaster recovery solution; and assessed security infrastructure, including IPS/IDS, security compliance, and firewall.

Xerox (05/2008 to 06/2009). As data center infrastructure architect for the Oracle Competency Center, Jim developed enterprise Service Oriented Architecture (SOA) platform using an Oracle SOA stack; assisted in deploying new enterprise provisioning, alarming, and ticketing services; and conducted a company-wide assessment of VMware infrastructure of Europe and North American data centers.

NYFIX, Inc. (01/2000 to 07/2006). As Vice President for Systems and Systems Architecture, Jim was responsible for all new project initiatives, core infrastructure technology, and systems level operations, including management of infrastructure operations, with responsibility for over 65% of all order flow volume to the New York Stock Exchange (NYSE); management of infrastructure security; compliance with Security Exchange Control infrastructure requirements; and management of multiple generations of data center technology change, including three data center migrations.

Ryan Wrisley, MHCDS, PMP®

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant (employed with BerryDunn from 2011 to 2014 and since 09/2019)
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	MHCDS, Dartmouth College BA, Business Administration, University of Maine at Orono Project Management Professional, Project Management Institute

Overview

Ryan is an experienced project manager, with a unique blend of business and technical experience through his IT strategic planning and requirements development work with state agencies and his previous work as implementation manager for a vendor of commercial financial accounting software. He is experienced in managing large-scale engagements/projects and leading initiatives that promote the open exchange of ideas and strengthen organizational performance.

Relevant Experience

BerryDunn (2011 to 2014; 09/2019 to present)

- Maryland Health Benefit Exchange – IV&V for Maryland's HBE Implementation (11/2012 to 04/2014).**
 Ryan served as a quality assurance analyst for a project valued at approximately \$200 million dollars. He worked closely with the project manager and the project team who performed IV&V activities such as identifying risks and issues through a repeatable cycle process of performing interviews, evaluating documentation, and direct observation of activities being conducted to develop the Health Insurance Exchange. He also worked with the team to develop and present monthly findings and recommendations for mitigation that were communicated to the Executive Leadership of the project.
- West Virginia Offices of the Insurance Commissioner (OIC) – Health Insurance Exchange Planning (06/2011 to 03/2013).**
 Ryan served as Project Manager for the development of a Strategic Technology Plan to guide West Virginia OIC's planning for its Health Insurance Exchange (HIX). In addition, he has provided program and portfolio management of the OIC's various planned initiatives that must take place in order for the HIX to become fully operational and comply with federal healthcare reform requirements.
- Maine Human Resources Division (HRD) – System Analysis and Requirements Development for Procurement of Human Resources Management System (03/2012 to**

08/2012).

Ryan served as project manager for the development of requirements for an RFP to procure a Human Resources Management System (HRMS) for the State of Maine's HR Division. Ryan's responsibilities included:

- Conducting a Current Environment Assessment
 - Documenting process flows for each of the major business processes
 - Identifying issues, challenges, and bottlenecks within each process flow
 - Conducting research of peer state agencies
 - Developing technical and functional requirements for inclusion in an RFP to procure a new HRMS
- **Massachusetts Office of the State Auditor (OSA) – IT Roadmap (04/2012 to 06/2012).**

Ryan served as project manager for BerryDunn's engagement to develop a 48-month Technology Roadmap. His responsibilities included:

 - Conducting a Current Environment Assessment
 - Identifying issues, challenges, and bottlenecks with current systems and processes
 - Conducting research of peer state agencies
 - Developing technology initiatives to address the issues, challenges, and bottlenecks
 - Providing a Technology Roadmap to guide the State Auditor's Office over a four-year horizon
- **New Hampshire Liquor Commission (NHLC) – Project Management for Next Generation Retail Business Systems (03/2011 to 01/2012).**

Ryan served as project manager for a systems planning and RFP development project for the procurement of a new retail chain enterprise system for the NHSLC. The new system would replace the NHSLC's existing retail Point-of-Sale software, Warehouse Inventory Management System, Liquor Inventory and Distribution System, and supporting back office systems.

MaineHealth Accountable Care Organization (MHACO) (2015 to 09/2019). As the senior director of data operations and analysis, Ryan was responsible for data operations, analytics and clinical applications teams for the MHACO. He procured an enterprise-wide multi-million-dollar Population Health Management Software Tool; was responsible for the aggregation of EMR/EHR data across different EMR/EHRs as well as claims data from commercial payors and CMS MSSP; developed analytic strategy and plan tied to operating plan to enable data-driven decisions; developed a data request triage process as well as data request help-desk process, and implemented help-desk software; and oversaw the legacy internally built clinical integration registry and the transition to the new Population Health Tool.

Dartmouth Medical School, Northern New England Accountable Care Collaborative, & High Value Health Care Collaborative (2014 to 2015). Ryan served as an account manager and program director, hired by Dartmouth Medical School to work with NNEACC and HVHC to establish process and structure around programs and manage member accounts. He established internal project management process, and worked with core disease research teams at HVHC to determine and develop structure around each of the teams and assist in providing focus, tracking deliverables, developing reporting process, and defining value and goal attainment.

Tyler Technologies (2002 to 2011). As implementation manager for Tyler Technologies (formerly Advanced Data Systems), Ryan managed a team of consultants implementing financial software for the company's School Solutions Division. He managed software implementations in accordance with PMI standards for schools and health centers. Ryan successfully managed over 350 projects from point of sale to handoff to support, including meeting with clients to establish a project timeline, creating and reviewing documentation, facilitating client status meetings, obtaining client approval of key deliverables and milestones, providing quality assurance oversight of implementation activities, and managing staff resources. In addition, he provided client software support for MUNIS financial accounting software.

Bath Iron Works (1999 to 2000). As a buyer for Bath Iron Works, Ryan managed a multi-million dollar budget and was responsible for purchasing multiple commodities. He implemented an inventory system for warehousing at the shipyard, developed and maintained purchasing contracts with suppliers, and assisted with the shipyard's SAP procurement system implementation.

Megan Blount, MBA

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant with BerryDunn since 04/2021
Years of Experience Relevant to Proposed Role:	8 years
Certifications and Education:	MBA, University of Charleston BS, Communications, West Virginia State University

Overview

Megan is a highly efficient project coordinator, experienced in scheduling, time management, written and verbal communication, and collaboration with all levels of administrators, stakeholders, and community leaders. She is comfortable performing detailed and intricate tasks with a high degree of accuracy and confidentiality within a complex environment with tight, constantly shifting deadlines.

Relevant Experience

West Virginia State Tax Department (10/2019 to present). As a tax analyst, Megan performs research projects involving the collection of taxes to provide feedback on internal policies and controls. She analyzes data to produce internal reports on tax proposals, law(s), regulations, and in support of general administration of taxes; assists in the development of tax administration and desk audit programs by providing data analysis of the taxpayer base; and provides meaningful analysis of revenue reports prior to distribution of special revenue funds and local government distributions.

Thyssenkrupp Elevator (TKE) (10/2018 to 01/2019). Megan served as the operations coordinator for new installation and modernization. In this role, she provided project level administrative support (i.e., meeting organization, distribution of information, meeting minutes), acted as point of contact for mechanics and subcontractors as directed by management, and assisted in documentation management.

West Virginia State University (06/2013 to 10/2018)

- **Assistant Director, International Affairs (01/2016 to 10/2018).** Megan worked with both degree-seeking and non-degree seeking international students, working with a recruiting agency, evaluating foreign transcripts, creating and managing admission reports, and maintaining process and procedure manuals.
- **Assistant Director, Academic Educational Outreach (04/2014 to 01/2016).** Megan partnered with Director to provide evidence and submit accreditation application for the National Alliance of Concurrent Enrollment Partnerships (NACEP). She provided outreach and registration for Early Enrollment/Dual Credit program, and provided support to the WVSU Prison Initiative program.

- **Executive Secretary, Academic Affairs (06/2013 to 04/2014).** Megan served as the Liaison for Academic Policies Committee, WVSU Board of Governors; managed front office for Academic Affairs, scheduled meetings and events, and worked closely with the Office of the President.

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.

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 Illinoisan (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.

Karla Fossett, MFA, Prosci® CCP

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

Overview

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

Relevant Experience

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

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

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

Carole Ann Guay

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

Overview

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

Relevant Experience

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

- **Oregon Enterprise Technology Services (OR ETS) – Integrated IT Service Management (ITSM) (03/2018 to present).**
Carole Ann developed high-level workflow and dataflow diagrams through on-site meetings as well as conference call sessions.
- **Colorado Office of the State Auditor – IT Evaluation (09/2017 to present).**
Carole Ann coordinates document request items, status reports, meeting requests, and data management.
- **New Mexico Corrections Department (NMCD) – COTS Offender Management System (OMS) Replacement (11/2016 to present).**
Carole Ann compiles weekly status reports and participates in interviews as well as survey analysis.
- **Metropolitan Government of Nashville and Davidson County (Metro), TN – Information Security Program Development (05/2016 to present).**
For Metro's, development of their Information Security Management Program, Carole Ann worked as a project coordinator, assisting in the development of findings reports. In addition, she served as part of the team performing a Payment Card Industry (PCI) Readiness Assessment. These activities included identifying Metro's current state of PCI, identifying where PCI data resides and where it traverses the network.
- **Vermont Department of Vermont Health Access – Vermont Health Connect Financial and Programmatic Audit (01/2016 to present).**

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

- **Minnesota Health Benefit Exchange (MNSure) – Programmatic Audit (10/2015 to present).**
BerryDunn is performing the programmatic audit for the State's health insurance exchange. Carole Ann is the project coordinator for BerryDunn's audit team assessing whether MNSure's program is compliant with all federal requirements.
- **Sacramento Municipal Utility District (SMUD) – Information Security Audit (08/2016 to 12/2017).**
Carole Ann provided documentation support and deliverable assistance for SMUD's Information Security Audit.
- **West Virginia Department of Health and Human Resources (DHHR) – Eligibility and Enrollment Independent Security and Privacy Controls Assessment (01/2017 to 07/2017).**
Carole Ann served as an analyst for West Virginia Eligibility and Enrollment (E&E) Independent Security and Privacy Assessment project. The independent assessment was completed against the CMS MARS-E v2.0 framework.
- **Massachusetts State Ethics Commission – CMS Planning and Implementation Services (04/2017 to 06/2017).**
Carole Ann provided deliverable support, as well as data gathering and organization for this project. She also participated in on-site fact-finding meetings.
- **Washington State Auditor's Office (SAO) – Local Government IT Security Audits (11/2014 to 06/2017).**
Carole Ann served as a technical analyst assisting in the performance of information security audits for various municipalities throughout the State of Washington, sponsored by the SAO, conducting assessment activities and analysis of current environments. The team assisted in identifying threats, vulnerabilities, and risks, in addition to providing recommendations for remediation.
- **Webber Energy Fuels (2004 to 2014).** As the office coordinator, Carole Ann oversaw several operations, including payroll for office staff of 30 employees, Daily Product Control of fleet deliveries, the balancing and reconciling of previous day's postings, credit checks and opening of all new accounts, and the cash drawer and accounts receivable. She worked directly with sales and service ensuring new customer satisfaction, and directly assist the branch manager in all daily office operations.

Caitlin Cabral

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Editor (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.

Relevant 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.

Bethany Pike

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

Overview

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

Relevant Experience

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

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

Vigilant Capital Management (02/2011 to 05/2012). As Client Relationship Administrator, Bethany completed new account documentation and assured that assets were received in a

timely fashion; processes gifts of stocks; executed bill paying and beneficiary disbursements; prepared quarterly statements and tax documentation; and maintained extensive face-to-face, written, and telephone communication with clients, prospects, and centers of influence.

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

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

Emily Hendrickson

Proposed Project Role:	Project Management Support Services
Role at BerryDunn:	Staff Editor (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 an editor 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 an editor, 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.

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 spell, as well as wrote copy for planning guides included with shipments.