



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: 04-14-2022

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 BMS2200000027 1	Procurement Folder:	1030162
Document Name:	Child Welfare Initiatives Services Phase IV	Reason for Modification:	
Document Description:	Child Welfare Initiatives Services Phase IV		
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		6-14-2024

VENDOR	DEPARTMENT CONTACT																				
Vendor Customer Code: 000000100150 BERRY DUNN MCNEIL & PARKER LLC 2211 CONGRESS ST PORTLAND ME 04102 US Vendor Contact Phone: 6813138905 Extension: Discount Details: <table><thead><tr><th></th><th>Discount Allowed</th><th>Discount Percentage</th><th>Discount Days</th></tr></thead><tbody><tr><td>#1</td><td>No</td><td>0.0000</td><td>0</td></tr><tr><td>#2</td><td>No</td><td></td><td></td></tr><tr><td>#3</td><td>No</td><td></td><td></td></tr><tr><td>#4</td><td>No</td><td></td><td></td></tr></tbody></table>		Discount Allowed	Discount Percentage	Discount Days	#1	No	0.0000	0	#2	No			#3	No			#4	No			Requestor Name: Kelly (Jimmy) Dowden Requestor Phone: (304) 356-4861 Requestor Email: jimmy.k.dowden@wv.gov 22 FILE LOCATION
	Discount Allowed	Discount Percentage	Discount Days																		
#1	No	0.0000	0																		
#2	No																				
#3	No																				
#4	No																				

INVOICE TO	SHIP TO
PROCUREMENT OFFICER: 304-352-4286 HEALTH AND HUMAN RESOURCES BUREAU FOR MEDICAL SERVICES 350 CAPITOL ST, RM 251 CHARLESTON WV 25301-3709 US	PROCUREMENT OFFICER: 304-352-4286 HEALTH AND HUMAN RESOURCES BUREAU FOR MEDICAL SERVICES 350 CAPITOL ST, RM 251 CHARLESTON WV 25301-3709 US

Total Order Amount: \$7,363,618.00

Purchasing Division's File Copy

ENTERED

CH 4/26/22
PURCHASING DIVISION AUTHORIZATION
DATE: Linda Harper 4/27/2022
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION
DATE: 4/27/2022
ELECTRONIC SIGNATURE ON FILE

Extended Description:

Child Welfare Initiatives Services Phase IV

Dates of Service: 05/01/2022-04/30/2024

Total: \$7,363,618.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$98,040.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-01	2024-04-30				

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

Lead Project Manager: Base Year One

Hourly Rate: \$215.00

Charlie Leadbetter: 456 Hours @ \$215.00=\$98,040.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$25,920.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-01	2024-04-30				

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

Engagement Manager: Base Year One

Hourly Rate: \$270.00

Nicole Becnel: 96 Hours @ \$270.00=\$25,920.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$6,558,125.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-01	2024-04-30				

Commodity Line Description: General Project Manager: Base Year One

Extended Description:

General Project Manager: Base Year One

Hourly Rate: \$175.00

Lisa Roberts: 3,744 Hours @ \$175.00=\$655,200
 Annie Messinger: 3,609 Hours @ \$175.00=\$631,575
 Karen Edgecomb: 3,609 Hours @ \$175.00=\$631,575
 Michelle Weaver: 3,500 Hours @ \$175.00=\$612,500
 Zara O'Hora: 3,500 Hours @ \$175.00=\$612,500
 John Byer: 3,011 Hours @ \$175.00=\$526,925
 Thomas Laba: 1,950 Hours @ \$175.00=\$341,250
 Peter Tierman: 1,919 Hours @ \$175.00=\$335,825
 Lars Loren: 288 Hours @ \$175.00=\$50,400
 Arisara Miller: 1,488 Hours @ \$175.00=\$260,400
 Dina Nash: 936 Hours @ \$175.00=\$163,800
 Jim Strassenburgh: 69 Hours @ \$175.00=\$12,075
 Ryan Wrisley: 35 Hours @ \$175.00=\$6,125
 James Highland: 48 Hours @ \$175.00=\$8,400
 Lloyd Butler: 1,681 Hours @ \$175.00=\$294,175
 Andrea Clark: 2,423 Hours @ \$175.00=\$424,025
 Yang Ji: 2,977 Hours @ \$175.00=\$520,975
 Donna Friedsam: 744 Hours @ \$175.00=\$130,200
 Fei Zou: 744 Hours @ \$175.00=\$130,200
 Chris Fanikos: 1,200 Hours @ \$175.00=\$210,000

Total: 37,475 Hours @ \$175.00=\$6,558,125

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$407,448.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-01	2024-04-30				

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

Extended Description:

Project Management Support Staff: Base Year One

Hourly Rate: \$80.00

Scott Whiting: 240 Hours @ \$80.00=\$19,200
 Courtney Rombow: 3,361 Hours @ \$80.00=\$268,880
 Erica Hoffman: 242 Hours @ \$80.00=\$19,360
 Caitlin Cabral: 125 Hours @ \$80.00=\$10,000
 Carol Ann Guay: 125 Hours @ \$80.00=\$10,000
 Molly Hawkinson: 125 Hours @ \$80.00=\$10,000
 Emily Hendrickson: 125 Hours @ \$80.00=\$10,000
 Bethany Pike: 125 Hours @ \$80.00=\$10,000
 Jordan Ramsey: 125 Hours @ \$80.00=\$10,000
 Jon Williams: 125 Hours @ \$80.00=\$10,000
 Mary Corley: 125 Hours @ \$80.00=\$10,000
 Janine DiLorenzo: 125 Hours @ \$80.00=\$10,000
 Karla Fossett: 125.1 Hours @ \$80.00=\$10,008

Total: 5,093.1 Hours @ \$80.00=\$407,448.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
5	80101600	0.00000		\$0.0000	\$274,085.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-01	2024-04-30				

Commodity Line Description: Lead Child Welfare Project Manager: Base Year One

Extended Description:
 Lead Child Welfare Project Manager: Base Year One

Hourly Rate: \$205.00

Warren Graver: 1,337 Hours @ \$205.00=\$274,085



March 7, 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 (DHHR), Bureau for Medical Services (BMS) to provide project management, consulting and subject matter expert (SME) services, under our contract (HHR 21*3). As stated in the Child Welfare Initiatives Project Management Services Phase IV SOW document, the duration of this work is estimated to be 24 months. BerryDunn agrees to a SOW start date effective on or after May 1, 2022. The work would then conclude on April 30, 2024.

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

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

Best Regards,

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

Nicole Becnel
Principal
681-313-8905



**Staffing Plan and Scope of Work (SOW) for the State of West
Virginia
Child Welfare Initiatives Project Management
Services Phase IV**

Prepared for HHR21*3



March 7, 2022

Submitted by:

Nicole Becnel, PMP®, Engagement Manager
Charlie Leadbetter, PMP®, Project Principal
Lisa Roberts, Project Manager
BerryDunn
300 Capitol Street, Suite 1610
Charleston, WV 25301
Phone: 207.650.2048
nbecnel@berrydunn.com
cleadbetter@berrydunn.com
lisa.roberts@berrydunn.com

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Staffing Plan and SOW

For the Child Welfare Initiatives Project Management Services Phase IV

1.0 Key Information

This document intends to help ensure a common understanding of expectations as they relate to the deliverables and services that the Child Welfare Initiatives Project Management Services Phase IV (CWI Phase IV) Staffing Plan and Scope of Work (SOW) will provide.

BerryDunn will complete this work in accordance with the terms and conditions of the base contract between BerryDunn and the State of West Virginia (State).

1.1 Background Information

Since 2019, BerryDunn has assisted DHHR on several critical child welfare initiatives. These included completing a compliance assessment related to the Families First Prevention Services Act (FFPSA), project management assistance in creating the United States (U.S.) Department of Justice (DOJ) Agreement (the Agreement) Implementation Plan (IP), and transition planning support for the Bureau for Social Services (BSS) as it transitioned its Safe at Home (SAH) program from the federally funded Title IV-E Demonstration Waiver to a sustainable State-funded program.

These initiatives have ongoing activities and timelines extending through Calendar Year (CY) 2024. The terms of the DOJ Agreement are for five years, and the State continues to implement aspects of the FFPSA, including the prevention plan and right-sizing residential treatment facilities. Over the next 24 months, the State requires ongoing project management and other operational support services centered on the aforementioned high-priority projects that BerryDunn is currently supporting and other critical initiatives such as House Bill HB2010, HB4092, HB2260, HCR35, and the child welfare reform efforts.

The project management services would be singularly focused on coordinating activities across these initiatives, keeping tasks and projects on schedule, and providing decision support while directly accountable to the Department of Health and Human Resources (DHHR) and BSS leadership. The BerryDunn project management team would strengthen the execution of priority BSS initiatives by helping to ensure that programmatic and policy changes are managed in a controlled manner and would support the State project teams and the people making funding, prioritization, and resourcing decisions.

In addition, the State has requested BerryDunn's assistance in formulating the basis for a Quality Assessment and Performance Improvement (QA/PI) system, including analytics support and a Continuous Quality Improvement (CQI) plan, which are foundational components of the DOJ Agreement. The QA/PI work will require two distinct levels of effort: 1) The design, management, and analysis of eligibility, child placement, and service utilization data and synthesizing a dashboard report in alignment with pre-defined measures from the DOJ Agreement that are goal posts for success and progress toward compliance; and 2) The

ongoing development, finalization, and implementation of the CQI plan that was presented to the Legislature in December 2021.

The primary goals of this project include, but are not limited to:

- *Project prioritization*: creating and executing the initiative and project decision-making matrix.
- *Project management*: assisting with project/task initiation, planning, execution, control, and completion.
- *Project governance*: developing project and program structures; ensuring accountability.
- *Project tracking report*: communicating the status of the projects.
- *Project coordination*: sharing knowledge across teams; avoiding redundant activities.
- *Project support*: scheduling meetings; documenting notes, action items, decisions, and risks; providing quality assurance.
- *Policy updates*: update State policies to reflect procedural and programmatic changes from initiatives.
- *Business process improvement*: analyze, reengineer, and improve business processes to support project implementation.
- *Change management*: utilize organizational change processes to help DHHR prepare for changes related to the initiatives, and manage and reinforce the changes.
- *Data management and analytics*: develop the ongoing blueprint for the DOJ Agreement data and reports, including requirements discovery, prototyping, coding, technical specifications, testing, data extracts, and submitting associated code sets to the State.
- *CQI*: develop and implement the framework for an approved CQI plan and transition of that plan to the Office of Quality Assurance for Children's Programs.

1.2 Assumptions

BerryDunn made the following assumptions in preparing this SOW:

- This work, which is projected to continue for 24 months, is scheduled to begin on May 1, 2022, and end on April 30, 2024, assuming the approval of this SOW occurs before May 1, 2022.
- This is an hours-based SOW with a total of 44,457.1 hours for the 24-month project. Any work required beyond this number of hours will require a change request to this SOW or a separate SOW.

- The child welfare initiatives covered by this scope include, but are not limited to, the following:
 - FFPSA prevention plan support, including installing clearinghouse prevention services throughout the State and executing on prevention candidacy claiming.
 - DOJ Implementation Plan tasks, including project management of the detailed work plans for the workgroups. This includes creating detailed design documents and performing project oversight, as well as the ongoing implementation of the QA/PI System and Dashboard and CQI plan.
 - Continuation of the SAH redesign including program sustainability and fidelity.
 - Child Adolescent Strengths and Needs' (CANS') automated system design support and development coordination and project management.
 - Child-placing agencies' (CPAs') performance-based contracts, including procurement and evaluation support, contract implementation, and outcome measure tracking and data analysis.
 - Therapeutic Foster Care (Treatment and Stabilization Home) program model development and implementation, including contract amendment and evaluation support, contract implementation, and outcome measure tracking and data analysis.
 - Random Moment in Time Study (RMTS) optimization, including procurement support, technology system implementation, and cost allocation plan updates.
- Should changes related to Information Technology (IT) systems, including changes to State or other data sources supporting previously implemented systems, be identified during the course of this SOW, the State and BerryDunn will coordinate prioritization of efforts necessary to support these changes with the appropriate State and/or vendor parties.
 - If supporting these changes requires creating or documenting detailed functional requirements including data capture, such support may necessitate either a change request to this SOW, a separate SOW, or support through another DHHR BerryDunn SOW (e.g., People's Access to Health [PATH]).
- As part of the CWI Phase IV, BerryDunn will provide project management, subject matter expertise, and support activities for the design, development, and implementation (DDI) of multiple business initiatives and activities that DHHR and BSS might undertake during this SOW's period. BerryDunn may perform services including, but not limited to, program research, financial analysis and modeling, waiver construction, regulatory analysis, federal and stakeholder negotiation, policy and procedure assistance, and program development.

- DHHR key staff will be available to participate when necessary throughout the project, including, but not limited to, project initiative workgroup meetings, and ad hoc meetings.
- The State project sponsor(s) and lead(s) will provide timely decision-making and responses to information requests from the BerryDunn project team.
- Project documents, including meeting outcomes, action items, risks, issues, and decisions, will be maintained by BerryDunn on an agreed-upon SharePoint site and will be shared with the project sponsor(s).
- BerryDunn will provide deliverables in an agreed-upon format.

The State leadership team will consist of Jeffrey Pack, BSS Commissioner, and Cynthia Beane, Bureau for Medical Services (BMS) Commissioner, as the State project sponsors; and Cammie Chapman, DHHR Associate General Counsel, as the State project lead. This effort will include cross-bureau collaboration to meet the objectives of DHHR as it relates to children's mental health reform and child welfare reform.

The BerryDunn leadership team will consist of Nicole Becnel, Charlie Leadbetter, Warren Graver, and Lisa Roberts. Warren Graver will provide oversight as the Lead Child Welfare Project Manager, and Lisa Roberts will provide project oversight as the day-to-day project manager.

1.3 Funding

The State intends to utilize the Medicaid Management Information System (MMIS) Implementation Advance Planning Document Update (IAPD-U) (formerly the MITA APD) for this SOW. The Centers for Medicare & Medicaid Services (CMS) has previously approved the MMIS IAPD on February 15, 2022, for total state and federal funds in the amount of \$56,989,025 under project identifier WV-2022-01-24-MMIS-MITA IAPDU. The estimated cost of the services to be delivered under this 24-month SOW is \$7,363,618 (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.

The IAPD-U includes the following project goals that describe how this SOW aligns with the following Medicaid Information Technology Architecture (MITA) Transformation Goals:

- Gen 1.0 – Improve the State's effectiveness and efficiency
- Gen 2.0 – Minimize risk and maximize value from contracted services and products
- Gen 3.0 – Leverage technology to enhance performance and decision-making
- Gen 4.0 – Assess, implement, and monitor compliance with relevant federal laws and regulations

- **Gen 5.0 – Ensure program quality**
- **CM 1.0 – Improve healthcare outcomes for members**
- **OM 1.0 – Improve operational efficiency and reduce costs in the healthcare system**
- **OM 1.3 – Enhance and automate reporting capabilities to measure compliance with operational performance measures**
- **CO 1.0 – Enhance DHHR's ability to monitor contractor performance against approved measures**
- **PE 1.0 – Improve effectiveness and efficiency of PE function**
- **PL 1.0 – Enhance DHHR's ability to analyze the effectiveness of potential and existing benefits and policies**

2.0 Project Scope and Staffing Plan

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

Table 1: Service Approach, Deliverables, and Completion Criteria

Ref #	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
1.0	<p>Engagement Oversight</p> <p><i>Service Approach</i></p> <p>Throughout the contract duration, BerryDunn will provide engagement oversight services including, but not limited to, the following:</p> <ul style="list-style-type: none"> 1.1 Ongoing project oversight 1.2 Oversight meetings <p><i>Deliverables</i></p> <ul style="list-style-type: none"> • D01: Monthly Commissioner Briefing <p><i>Completion Criteria</i></p> <p>The signature acceptance by the State project sponsor or his/her designee of the Project Completion Summary will deem Engagement Oversight complete.</p>	<p>Nicole Becnel</p> <p>Charlie Leadbetter</p> <p>Lisa Roberts</p> <p>Warren Graver</p>	592
2.0	<p>Project Management Services</p> <p><i>Service Approach</i></p> <p>The BerryDunn team will be responsible for execution, control, and monitoring of project activities in accordance with the Project Management Plan (PMP). BerryDunn will provide the following services:</p> <ul style="list-style-type: none"> 2.1 BerryDunn's team will be responsible for the execution, control, and monitoring of project activities in accordance with the approved PMP (original PMP approved during CWI Phase I to be revised). Project execution activities may include program analysis and design. 2.2 BerryDunn will provide reporting that contains (at a minimum) updates on project accomplishments during the 	<p>Charlie Leadbetter</p> <p>Lisa Roberts</p> <p>Warren Graver</p> <p>Annie Messinger</p> <p>Karen Edgecomb</p> <p>Michelle Weaver</p> <p>Zara O'Hora</p> <p>Courtney Rombow</p> <p>Andrea Clark</p> <p>John Byer</p> <p>Thomas Laba</p>	3,080

Ref #	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	<p>reporting period, planned activities for the following reporting period, key decisions, issues, and risks.</p> <p>2.3 BerryDunn will provide dashboard tracking of project activities to identify the current status of the analysis, decision-making, planning, and implementation. This includes the status, by provision, of federal rules and guidance and impacts identified in impact assessments.</p> <p>2.4 BerryDunn will coordinate and facilitate regularly scheduled meetings (frequency and number to be determined by the project sponsor and the project lead in conjunction with BerryDunn project management team) to discuss the status of the project. BerryDunn will use these meetings to make the stakeholders and business owners aware of risks, issues, and/or items that may require their attention and plan responses.</p> <p>2.5 BerryDunn will manage action items, decisions, risks, issues, and general project meetings.</p> <p>2.6 BerryDunn will provide meeting facilitation, preparation of meeting materials, and notetaking for BerryDunn and State-owned meetings (as requested).</p> <p>2.7 BerryDunn will manage the documentation of deliverables, in an agreed-upon SharePoint location.</p> <p>2.8 BerryDunn will facilitate a DOJ Implementation Plan Weekly Touchpoint</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> • D02: Phase IV Project Management Plan • D03: Monthly Status Report • D04: Monthly Project Issue and Risk Escalation Report 		

Ref #	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none"> D05: Monthly Decision Log D06: Monthly Project and Workgroup Dashboard D07: Master Project Schedule <p><i>Completion Criteria</i></p> <p>The signature acceptance by the State project sponsor or his/her designee of the Project Completion Summary will deem Project Management Services complete.</p>		
3.0	<p>DOJ Workgroup Facilitation</p> <p><i>Service Approach</i></p> <p>BerryDunn will assist with stakeholder and business owner engagement (e.g., coordination, planning, preparation, and facilitation of meetings) as well as additional tasks related to the child welfare initiatives identified in Section 1.0 of this SOW.</p> <p>The BerryDunn team will work with DHHR staff to incorporate change management principles to prepare, equip, and support individuals to adopt change. In alignment with a proven methodology, BerryDunn's approach to change management will be to utilize change management processes that will continue through the life of the project.</p> <p>BerryDunn will also be responsible to facilitate meetings and utilize change management processes throughout the duration of this project.</p> <p>Some of the meetings BerryDunn will facilitate include:</p> <ul style="list-style-type: none"> 3.1 Executive Steering Committee Strategy meetings 3.2 DOJ Workgroup Leads Meetings 3.3 Child Welfare Issues Meetings 3.4 DOJ West Virginia University Evaluation Plan Touchpoints 3.5 DOJ Therapeutic Foster Care (Treatment and Stabilization Home) Workgroup 	<p>Charlie Leadbetter</p> <p>Lisa Roberts</p> <p>Annie Messinger</p> <p>Karen Edgecomb</p> <p>Michelle Weaver</p> <p>Zara O'Hora</p> <p>Courtney Rombow</p> <p>Erica Hoffman</p> <p>Andrea Clark</p> <p>Lars Loren</p> <p>Yang Ji</p> <p>John Byer</p> <p>Thomas Laba</p> <p>Caitlin Cabral</p> <p>Carol Ann Guay</p> <p>Molly Hawkinson</p> <p>Emily Hendrickson</p> <p>Bethany Pike</p> <p>Jordan Ramsey</p> <p>Jon Williams</p> <p>Mary Corley</p> <p>Janine DiLorenzo</p> <p>Karla Fossett</p>	8,359

Ref #	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	<p>3.6 DOJ Pathway to Children's Mental Health Services (CMHS) Workgroup</p> <p>3.7 DOJ Reducing the Reliance on Residential (R3) Workgroup</p> <p>3.8 DOJ Home and Community Based Services (HCBS) Workgroup</p> <p>3.9 DOJ Outreach and Education (O&E) Workgroup</p> <p>3.10 DOJ QA/PI Workgroup</p> <p>3.11 DOJ Workforce Workgroup</p> <p>3.12 DOJ Subject Matter Expert (SME) meeting and technical assistance discussions.</p> <p>3.13 Quality Committee meetings</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> D08: Workgroup Facilitation Materials <p><i>Completion Criteria</i></p> <p>The signature acceptance by the State project sponsor or his/her designee of the Project Completion Summary will deem DOJ Work Group Facilitation complete.</p>		
4.0	<p>Policy Development</p> <p><i>Service Approach</i></p> <p>Many DHHR policies will be impacted by the child welfare initiatives identified in Section 1.0. BerryDunn will assist DHHR in helping to ensure the State policies are updated to reflect procedural and programmatic changes based on the initiatives. The assumption is that the State is the ultimate owner of such policy updates and will be responsible for drafting policy language. BerryDunn will provide the following services in support of policy development:</p> <p>4.1 Conduct best practices and industry research analysis</p> <p>4.2 Conduct policy review and analysis</p> <p>4.3 Provide decision support and facilitation</p>	<p>Charlie Leadbetter</p> <p>Lisa Roberts</p> <p>Warren Graver</p> <p>Annie Messinger</p> <p>Karen Edgecomb</p> <p>Michelle Weaver</p> <p>Zara O'Hara</p> <p>Courtney Rombow</p> <p>John Byer</p> <p>Thomas Laba</p> <p>Peter Tieman</p>	3,438

Ref #	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	<p>4.4 Develop, review, and finalize draft policy language with project managers</p> <p>4.5 Manage decision and change logs</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> D09: Policy Review and Gap Analysis Recommendations D10: DHHR Policy and Procedures specific to compliance with the DOJ Agreement <p><i>Completion Criteria:</i></p> <p>The signature acceptance by the State project sponsor or his/her designee of Policy Review and Gap Analysis Recommendations Documents will deem this service complete.</p>		
5.0	<p>Business Process Improvement (BPI)</p> <p><i>Service Approach</i></p> <p>Through our project management activities, workgroup facilitation, and policy development services, BerryDunn will identify business processes that might impede efficient and effective operations and service delivery. The service focus will be on understanding the interrelatedness of people, processes, and technology, and how the business process impacts each of these three components. BerryDunn will adhere to a proven methodology in delivering BPI services, which includes the following:</p> <p>5.1 Mapping as-is business processes and providing workflow diagrams</p> <p>5.2 Analyzing as-is business processes and identifying steps that might be inefficient, out of alignment with policy and/or best-practices, redundant, and/or ineffective</p> <p>5.3 Redesigning the business processes to streamline them, create efficiency, bring them in alignment with policy and/or best practices, and/or make</p>	<p>Charlie Leadbetter</p> <p>Lisa Roberts</p> <p>Warren Graver</p> <p>Annie Messinger</p> <p>Karen Edgecomb</p> <p>Michelle Weaver</p> <p>Zara O'Hora</p> <p>Courtney Rombow</p> <p>John Byer</p> <p>Thomas Laba</p> <p>Peter Tieman</p>	3,323

Ref #	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	<p>them more effective</p> <p>5.4 Implementing the redesigned business processes using OCM methodology</p> <p>5.5 Establishing benchmarks and evaluation strategy to help ensure the redesigned business processes are actually improved</p> <p>5.6 Providing Treatment Home process redesign and implementation support</p> <p>5.7 Conducting a lessons learned analysis, if requested</p> <p>Deliverable(s)</p> <ul style="list-style-type: none"> • D11: As-Is Business Process Maps • D12: To-Be Business Process Recommendations, Implementation Plan, and Evaluation Strategy • D13: Lessons Learned Report, if requested <p>Completion Criteria</p> <p>The signature acceptance by the State project sponsor or his/her designee of the deliverables for this task will deem BPI complete.</p>		
6.0	<p>SAH Programmatic Support</p> <p>Service Approach</p> <p>BerryDunn will continue work related to SAH, including, but not limited to, the following activities:</p> <p>6.1 SAH Revenue Maximization (Federal Financial Participation [FFP])</p> <p>6.2 SAH support for RMTS</p> <p>6.3 SAH Study for Candidacy and Prevention regarding FFPSA</p> <p>6.4 SAH Eligibility Process Improvement</p> <p>6.5 Local Coordinating Agency (LCA) Provider Monitoring Process Improvement</p> <p>6.6 Support for CANS Automated System Improvements and Management</p>	<p>Lisa Roberts</p> <p>Annie Messinger</p> <p>Karen Edgecomb</p> <p>Courtney Rombow</p> <p>John Byer</p> <p>Thomas Laba</p> <p>Peter Tieman</p>	1,125

Ref #	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	<p>Completion Criteria</p> <p>The acceptance by the State project sponsor or his/her designee of the work for this task will deem SAH Programmatic Support complete.</p>		
7.0	<p>CQI Support</p> <p>Service Approach</p> <p>BerryDunn will continue to provide CQI support to finalize and implement the approved CQI plan. In collaboration with the Office of Quality Assurance for Children's Programs and small cross-bureau program-level teams, BerryDunn will perform the following:</p> <ul style="list-style-type: none"> 7.1 Help to ensure data collection is in place for capturing child level data 7.2 Work with program teams to establish a method for data collection, including a short-term, stop-gap solution and a long-term, systematic solution 7.3 Assist in setting up data extracts (i.e., queries) and match across data sets where possible 7.4 Assist in outlining report content, time periods, and associated visualizations 7.5 Assist in developing ongoing reports 7.6 Schedule and facilitate program-level data reviews 7.7 Develop/document quality sampling review processes (as relevant) <p>Deliverables</p> <ul style="list-style-type: none"> • D14: Finalize key performance Indicators and associated data collection per the CQI plan, including vendor data • D15: Plan for oversight, monitoring, and accountability for DHHR staff to follow workflows, policies, and procedures. • D16: Plan for oversight, monitoring, and accountability for vendor contracts 	<p>Charlie Leadbetter Lisa Roberts Warren Graver Annie Messinger Michelle Weaver Karen Edgecomb Zara O'Hora Courtney Rombow Thomas Laba James Highland Andrea Clark Lars Loren Yang Ji Lloyd Butler Arisara Miller Dina Nash Fei Zou Donna Friedsam Chris Fanikos Scott Whiting</p>	10,569

Ref #	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
8.0	<p>QA/PI System and Analytics Support</p> <p><i>Service Approach</i></p> <p>BerryDunn will continue to provide analytical support and design and development of the QA/PI data store and dashboard system supporting the CQI process. The scope of these services includes:</p> <ul style="list-style-type: none"> 8.1 Collaborate with the DHHR team to identify analytical support and reporting needs and identify actionable metrics of interest 8.2 Translate desired reporting and analyses into feasible logical specifications 8.3 Develop and prepare dashboards and reports that display defined indicators for children's behavioral health services per the DOJ Agreement 8.4 Reflect dashboard user requirements in the design of the dashboard and underlying database 8.5 Design data store architecture and develop databases and relevant transformations to validate, clean, and integrate data from multiple sources to support the QA/PI dashboards and CQI reporting; this will occur in collaboration with the DHHR Office of Management Information Services (OMIS) 8.6 Provide user documentation and training for dashboards, and developer/maintenance documentation for the underlying databases 8.7 Advise OMIS on dashboard and underlying data store access models for reporting, analysis, and file sharing purposes 8.8 Support for up to 20 ad-hoc data analysis requests <p><i>Deliverables</i></p> <ul style="list-style-type: none"> • D17: QA/PI logical specifications for performance measures per the DOJ 	<p>Charlie Leadbetter Lisa Roberts Warren Graver Annie Messinger Karen Edgecomb Courtney Rombow Michelle Weaver Thomas Laba James Highland Andrea Clark Lars Loren Yang Ji Lloyd Butler Arisara Miller Jim Strassenburgh Ryan Wisley Dina Nash Fei Zou Donna Friedsam Chris Fanikos Scott Whiting</p>	10,600

Ref #	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	<p>Agreement</p> <ul style="list-style-type: none"> D18: Specifications and Implementation framework for QA/PI data store to support dashboards and CQI reporting, associated data transformation code, and associated documentation for OMIS D19: Dashboards to support programs in the DOJ agreement D20: Analytical support for semiannual and CQI reporting D21: Results and documentation of ad hoc data analysis requests D22: Documentation and training for dashboard users and analysts <p><i>Completion Criteria</i></p> <p>The signature acceptance by the State project sponsor or his/her designee of the deliverables for this task will deem QA/PI Dashboard and System work complete.</p>		
9.0	<p>Sub-Project Management Services</p> <p><i>Service Approach</i></p> <p>9.1 Project management, including ongoing planning, monitoring, executing and reporting of approved sub-projects and ad hoc tasks in accordance with project management best practices</p> <p>9.2 Ad hoc support</p> <p><i>Deliverables</i></p> <ul style="list-style-type: none"> D23: Sub-Project Management Materials <p><i>Completion Criteria</i></p> <p>The signature acceptance by the State project sponsor or his/her designee of the deliverables for this task will deem Sub-Project Management Services complete.</p>	<p>Charlie Leadbetter Lisa Roberts Warren Graver Annie Messinger Karen Edgecomb Michelle Weaver Zara O'Hora Courtney Rombow John Byer Thomas Laba Peter Tieman</p>	3,276.1
10.0	<p>Project Closeout</p> <p><i>Service Approach</i></p> <p>10.1 General project closeout tasks</p> <p><i>Deliverables</i></p>	<p>Charlie Leadbetter Warren Graver Lisa Roberts Annie Messinger</p>	95

Ref #	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none"> D24: Project Closeout Summary <p><i>Completion Criteria</i></p> <p>The signature acceptance by the State project sponsor or his/her designee of the deliverable for this task will deem project complete.</p>	<p>Karen Edgecomb</p> <p>Andrea Clark</p> <p>Courtney Rombow</p> <p>Michelle Weaver</p>	
Total Estimated Hours Effort			44,457.1

3.0 Project Resources and Hours

The following tables include additional staffing plan details and total hours by resource, based on the hourly rates and staffing classifications listed for Years 1 – 3 on the Commodity Line (CL) for the current contract. The following roles and rates were used to compute the costs for each table:

- **EM** = Engagement Manager (\$270/hour)
- **LPM** = Lead Project Manager (\$215/hour)
- **LCW** = Lead Child Welfare Project Manager (\$205/hour)
- **GPM** = General Project Manager (\$175/hour)
- **SS** = Support Staff (\$80/hour)

Table 2: Total Estimated Hours and Costs (5/1/2022 – 4/30/2024)

CL Year 1-3	Role	Project Resources and Roles	Rate	Total Hours	Estimated Cost
2	EM	Nicole Bechel	\$270	96	\$25,920
1	LPM	Charlie Leadbetter	\$215	456	\$98,040
6	LCW	Warren Graver	\$205	1,337	\$274,085
4	GPM	Lisa Roberts	\$175	3,744	\$655,200
4	GPM	Annie Messinger	\$175	3,609	\$631,575
4	GPM	Karen Edgecomb	\$175	3,609	\$631,575
4	GPM	Michelle Weaver	\$175	3,500	612,500
4	GPM	Zara O'Hora	\$175	3,500	612,500
4	GPM	John Byer	\$175	3,011	\$526,925
4	GPM	Thomas Laba	\$175	1,950	\$341,250

CL Year 1-3	Role	Project Resources and Roles	Rate	Total Hours	Estimated Cost
4	GPM	Peter Tieman	\$175	1,919	\$335,825
4	GPM	Lars Loren	\$175	288	\$50,400
4	GPM	Arisara Miller	\$175	1,488	\$260,400
4	GPM	Dina Nash	\$175	936	\$163,800
4	GPM	Jim Strassenburgh	\$175	69	\$12,075
4	GPM	Ryan Wisley	\$175	35	\$6,125
4	GPM	James Highland	\$175	48	\$8,400
4	GPM	Lloyd Butler	\$175	1,681	\$294,175
4	GPM	Andrea Clark	\$175	2,423	\$424,025
4	GPM	Yang Ji	\$175	2,977	\$520,975
4	GPM	Donna Friedsam	\$175	744	\$130,200
4	GPM	Fei Zou	\$175	744	\$130,200
4	GPM	Chris Fanikos	\$175	1,200	\$210,000
5	SS	Scott Whiting	\$80	240	\$19,200
5	SS	Courtney Rombow	\$80	3,361	\$268,880
5	SS	Erica Hoffman	\$80	242	\$19,360
5	SS	Caitlin Cabral	\$80	125	\$10,000
5	SS	Carol Ann Guay	\$80	125	\$10,000

CL Year 1-3	Role	Project Resources and Roles	Rate	Total Hours	Estimated Cost
5	SS	Molly Hawkinson	\$80	125	\$10,000
5	SS	Emily Hendrickson	\$80	125	\$10,000
5	SS	Bethany Pike	\$80	125	\$10,000
5	SS	Jordan Ramsey	\$80	125	\$10,000
5	SS	Jon Williams	\$80	125	\$10,000
5	SS	Mary Corley	\$80	125	\$10,000
5	SS	Janine DiLorenzo	\$80	125	\$10,000
5	SS	Karla Fossett	\$80	125.1	\$10,008
Total				44,457.1	\$7,363,618

Table 3, below, includes the total estimated hours per month, broken down by project year.

Table 3: Total Estimated Hours and Cost per Year

CL Year	Total Hours	Estimated Cost
1	2,673	\$442,185
2	23,118	\$3,829,170
3	18,666.1	\$3,092,263
Total	44,457.1	\$7,363,618

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

Table 4: Total Estimated Hours per Month

Month	EM Hours	LPM Hours	LCW Hours	GPM Hours	SS Hours	Estimated Hours Per Month
Month 1	4	19	56	1,561	212	1,852
Month 2	4	19	56	1,561	212	1,852
Month 3	4	19	56	1,561	212	1,852
Month 4	4	19	56	1,561	212	1,852
Month 5	4	19	56	1,561	212	1,852
Month 6	4	19	56	1,561	212	1,852
Month 7	4	19	56	1,561	212	1,852
Month 8	4	19	56	1,561	212	1,852
Month 9	4	19	56	1,561	212	1,852
Month 10	4	19	56	1,561	212	1,852
Month 11	4	19	56	1,561	212	1,852
Month 12	4	19	56	1,561	212	1,852
Month 13	4	19	56	1,561	212	1,852
Month 14	4	19	56	1,561	212	1,852
Month 15	4	19	56	1,561	212	1,852
Month 16	4	19	56	1,561	212	1,852
Month 17	4	19	56	1,561	212	1,852
Month 18	4	19	56	1,561	212	1,852
Month 18	4	19	56	1,561	212	1,852
Month 20	4	19	56	1,561	212	1,852
Month 21	4	19	56	1,561	212	1,852
Month 22	4	19	56	1,561	212	1,852
Month 23	4	19	56	1,561	212	1,852
Month 24	4	19	49	1,572	217.1	1,861.1
Total	96	456	1337	37,475	5, 093.1	44,457.1

4.0 High-Level Timeline

The following table outlines the work by phase for months 1 – 24.

Table 5: High Level Project Timeline

Task	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
1.0 Engagement Oversight																								
2.0 Project Management Services																								
3.0 DOJ Workgroup Facilitation																								
4.0 Policy Development																								
5.0 Business Process Improvement																								
6.0 Safe at Home Programmatic Support																								
7.0 Continuous Quality Improvement Support																								
8.0 QA/PI System and Analytics Support																								
9.0 Sub-Project Management Services																								
10. Project Closeout																								

BerryDunn Authorized Signature

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

Nicole Y. Beemel 2022.04.08
12:32:01 -04'00'

Signature

Date

West Virginia Approval of Approach, Staffing, and Not-to-Exceed Cost

Cynthia H. Bean

Signature

4-12-22

Date

5.0 Resumes

Nicole Becnel, PMP®

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

Overview

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

Relevant Experience

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

- **West Virginia Bureau for Medical Services (BMS).**
 - *West Virginia Lead 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

Charles K. Leadbetter, PMP®, Prosci® CCP

Proposed Project Role:	Lead Project Manager
Role at BerryDunn:	Principal (employed full-time with BerryDunn since 1993)
Years of Experience Relevant to Proposed Role:	27 years
Certifications and Education:	BS, Computer Science and Economics, University of Maine Orono Certified Project Management Professional® Prosci® Certified Change Practitioner

Overview

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

Relevant Experience

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

- **Maine Office of Information Technology (OIT) and Office of Child and Family Services (OCFS) – Point-In-Time Independent Verification and Validation (IV&V) for Comprehensive Child Welfare Information System (CCWIS) (08/2020 to present).**

Charlie is the project principal on BerryDunn's IV&V team. The team is monitoring and assessing the CCWIS implementation project on a quarterly basis during the 18-month implementation, as well as for a period of six months after implementation.

- **Puerto Rico Department of Health (PRDoH) – Health Information Technology (HIT)/Health Information Exchange (HIE) Support Services (04/2020 to present).**
Charlie is serving as principal on this project to assist PRDoH with planning and implementation of an HIE. Services provided BerryDunn team include performing an HIT assessment and developing recommendations and an HIT roadmap to help ensure successful establishment of the HIE. In addition, BerryDunn is providing project management services for HIE planning and implementation activities, and other support such as development of the HIT IAPD and updates to Medicaid Information Technology Architecture (MITA) State Self-Assessment (SSA) documentation.

- **Arizona Department of Economic Security (ADES) – AALMPP Feasibility Study (04/2020 to present).**
Charlie is leading a team that is assisting the ADES in planning for the replacement of three legacy mainframe systems. This project involves performing a requirements analysis, alternatives analysis, and a cost benefit analysis to develop a comprehensive Implementation Advanced Planning Document (IAPD) and a DDI Statement of Work to procure replacement systems.
- **West Virginia Bureau for Public Health (BPH)**
 - *Enhancing Laboratory Capacity-Enhancing Detection (ELC-ED) Project Management (10/2020 to present)*
 - *Children with Special Health Care Needs Business Process Redesign and Procedure Manual Completion (03/2020 to present)*
 - *Electronic Vital Records System Implementation (02/2020 to present)*
 - *Emergency Medical Services Data System Procurement Support (11/2019 to 10/2020)*
 - *Strategic Map Implementation Support and Performance Management/Quality Improvement Planning (10/2019 to present)*
 - *HIV and Hepatitis Work Flow/Business Process Analysis and System Configuration (09/2019 to 06/2020)*
 - *Public Health Accreditation Preparation Project (10/2018 to 09/2019)*
- **Indiana State Department of Health Maternal and Child Health (MCH) – Data System Assessment (08/2019 to 09/2020).**
Charlie is project principal for this project to assess the current MCH data systems and end user applications, identify gaps and make recommendations, and develop requirements to enable the MCH Division to procure services and solutions needed to meet future data systems' needs. These needs include, but are not limited to health information exchange (HIE) systems interoperability; robust Extract, Transform, and Load (ETL) processes; provider access and information sharing, and data management as it relates to Title V block grant MCH national performance measures and State of Indiana-specific initiatives.
- **West Virginia Department of Health and Human Resources (DHHR) – Child Welfare Initiatives Project Management Services (10/2018 to present).**
Charlie is serving as the project principal providing project management services to the West Virginia DHHR, working to strengthen the execution of priority BCF initiatives by helping to ensure that programmatic and policy changes are being managed to support the

State project teams and the people making funding, prioritization, resourcing, and technical decisions.

- **West Virginia Bureau for Medical Services (BMS) – COVID-19 Contact Tracing and Testing Initiative (04/2020 to 08/2020)**
- **Arizona Department of Economic Security/Division of Developmental Disabilities (ADES/DDD) - Focus HIPAA TCS Compliance Project (04/2019 to 10/2019).**
Charlie was the project principal for this engagement to perform an assessment and gap analysis of DDD's compliance and alignment with HIPAA- and CMS- transactions and claim processing code sets and to develop alternatives and an IT roadmap to close gaps and achieve the desired future state.
- **Washington Health Benefit Exchange (WAHBE) – O&M System Integrator Re-Procurement Planning (05/2018 to 05/2019).**
Charlie provided leadership and oversight to this engagement to assess, define requirements, and develop an RFP for the re-procurement of an O&M system integrator for the WAHBE.
- **Vermont Department of Health Laboratory – Project Management and Technical Support for STARLIMS Implementation (02/2017 to 06/2018).**
Charlie was project principal leading our team that provided project management oversight for the implementation of the department's laboratory information system.
- **South Carolina Department of Health and Environmental Control (DHEC) – EHR System Planning and Procurement Assistance (09/2016 to 05/2018).**
Charlie served as project principal for this project with DHEC to plan for selection and implementation of an EHR. Key activities for this project included assessing the current environment, guiding DHEC through its vision for the desired future state, and performing a needs assessment. Additionally, the project team facilitated joint requirements planning sessions, developed system requirements, and developed an RFP for the EHR.
- **Hawai'i Department of Human Services Med-QUEST Division (MQD) – Organizational and Business Process Redesign (07/2017 to 04/2018).**
Charlie provided project leadership for this initiative to review studies, analyze documented operational processes, observe current workflow patterns, conduct interviews with key personnel, and gather information on current barriers to improving efficiency. The project will culminate in process improvement recommendations and strategies to implement proposed changes.

- **Vermont Agency of Human Services (AHS)**

- *Uniform Reporting Requirements and Specialized Programs Project (02/2015 to 10/2016).*

Charlie was principal for this project, working with AHS and Pacific Health Policy Group to develop uniform reporting requirements and business processes via the HSE to support state and federal reform initiatives.

- *Health Services Enterprise Lesson Learned Initiative (03/2014 to 04/2014).*
Charlie served as project principal for a "lessons learned" initiative to help the State evaluate the governance, management, and oversight of the initial implementation of this first release of the Health Services Enterprise solution (Vermont Health Connect and MAGI Medicaid eligibility) including the best approach to organizational realignment to meet their goals.

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

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

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

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

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

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

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

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

Charlie served as project manager for Massachusetts' Next Generation Systems

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

- *State Medicaid Health IT Planning and IAPD Development (10/2010 to 04/2011).*
BerryDunn led the development of Massachusetts' State Medicaid Health IT Plan (SMHP), as required by the American Recovery and Reinvestment Act and Health Information Technology Economic and Clinical Health Act. The SMHP serves as the strategic vision for EOHHS as it moves forward with the development of health information technology (HIT) and information exchange activities and will become a critical component of the overall Commonwealth HIT Plan. Following the development of the SMHP, BerryDunn developed the IAPD, which set forth the Commonwealth's funding request and cost justification to CMS. Charlie served as project director for this engagement, where he was responsible for four core teams of BerryDunn and subcontractor resources, along with subject matter experts and other project resources.

- **Maryland Health Benefit Exchange (HBE) – IV&V for Maryland's HBE Implementation (11/2012 to 04/2014).**

Charlie led BerryDunn's team to provide IV&V for Maryland's HBE implementation, to fulfill the State's health insurance eligibility and enrollment functionality and plan management, presentment, and selection. As principal, Charlie oversaw the quality of services provided by our project management team, our four core team analysts, and our pool of subject matter experts and analysts.

- **New Hampshire Governor's Commission on Medicaid Expansion – Consulting Services for Medicaid Eligibility Expansion Study (07/2013 to 10/2013).**

Charlie led a team that provided consulting services to a bi-partisan Commission established by the New Hampshire governor to study a possible Medicaid expansion for the State. The team's services were focused on process design for the Commission deliberations as well as report development and writing. In addition to leading the Feasibility

Study project, Charlie led the writing of the Report of the Commission to Study Expansion of Medicaid Eligibility that the Commission provided to the State legislature.

- **West Virginia Offices of the Insurance Commissioner (OIC) – Health Insurance Exchange (HIX) Planning (06/2011 to 06/2013).**

BerryDunn worked with the OIC on several key activities, most notably leading the development of the State's HIX IT Strategic Plan, which serves as a strategic roadmap for to guide the State in complying with Affordable Care Act (ACA) requirements and timelines. We also led the development of the HBE Business Plan and Financial Sustainability Model; developed an RFI for HBE systems vendors; provided grant-writing support; provided project management for several initiatives; facilitated the Plan Management workgroup; and provided policy analysis in areas such as financial management. Charlie served as principal for this engagement, providing project oversight and high-level management of the project team.

- **Missouri Department of Mental Health (DMH) – Electronic Medical Record System Assessment and Long-Range Information Strategy Plan (03/2013 to 04/2013).**

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

- **Vermont Department of Children and Families (DCF) – Project Management and Quality Control for Vermont Family and Children Tracking System (VFACTS) Implementation (02/2011 to 06/2012).**

The Vermont DCF engaged BerryDunn to analyze the current processes and business needs for the Child Development Division's Integrated Services Data Management System. As the result of our analysis, DCF determined the need to procure a new system. BerryDunn then assisted with the development of functional requirements and an RFP document. We then provided project advisory services during the implementation of the selected system. Charlie had responsibility for the quality of work provided to the DCF, including the approval of all deliverables.

- **Connecticut Department of Public Health (DPH) – Business Analysis of Licensing and Credentialing System (10/2007 to 04/2008).**

BerryDunn conducted a business needs assessment and workflow analysis of the processes DPH completed for its licensing and credentialing system. For this project, the team documented technical and functional requirements and developed a logical system

design document that outlined the necessary business, technical, and system interface requirements and created an entity relationship model. Charlie served as project manager for this engagement. BerryDunn's analysis provided the requirements necessary for DPH to create an RFP to procure a new system.

- **West Virginia Bureau for Medical Services (BMS) – Quality Assurance Oversight of MMIS and Pharmacy POS Implementation (04/2003 to 03/2008).**

BerryDunn worked in partnership with the State's BMS to assess the development and implementation of the MMIS replacement and Pharmacy POS system and help ensure that the systems developed met stated business and technical requirements. Charlie served as part of BerryDunn's project team to provide independent quality assurance services for the State's MMIS implementation.

- **New Hampshire Department of Health and Human Services (DHHS)**

- *IV&V for Medicaid Decision Support System (DSS) Implementation (01/2003 to 06/2005).*

Charlie served as project manager for BerryDunn's engagement to provide IV&V services for New Hampshire's Medicaid DSS implementation, which involved analyzing issues, risks, and system impacts and providing recommendations to mitigate these potential problems. As project manager, Charlie served as liaison with the State and vendor project teams, oversaw the services provided by BerryDunn's teams, and led the development of BerryDunn's deliverables.

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

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

Warren L. Graver, MBA, PMP®

Proposed Project Role:	Lead Child Welfare Project Manager
Role at BerryDunn:	Senior Consultant with BerryDunn since May 2020
Years of Experience Relevant to Proposed Role:	15 years
Certifications and Education:	<p>Bachelor of Arts in Marketing, Howard University</p> <p>Master of Business Administration in Organizational Management, Howard University</p> <p>Master Information Systems Management, Keller Graduate School of Management</p> <p>Certified Project Management Professional®, Project Management Institute®</p> <p>Certified Scrum Master (CSM)</p> <p>Six Sigma Lean Professional Certification</p> <p>Change Management Specialist Certification</p>

Overview

Warren leads BerryDunn's Child Welfare Practice and has extensive experience leading IT transformation and human services consulting engagements. His expertise include the replacement and enhancement of states' case management systems, child welfare and children services, stakeholder interactions, and requirements gathering. Warren leverages Agile or Waterfall project management methodologies to lead work streams, monitor project performance, address risks and issues, manage project resources and regularly communicate with stakeholders.

Experience

BerryDunn (May 2020 to present).

West Virginia Bureau for Public Health (BPH)

- *Women, Infants, and Children (WIC) Crossroads Management Information System (MIS) Product Management Office (PMO) (05/2020 to present)*

Warren is co- Product Manager and leads the team supporting a four state consortium in managing their Women Infants and Children (WIC) management information system (Crossroads). The team facilitates the ongoing collaborations between with the consortium, United States Department of Agriculture (USDA),

Food and Nutrition Service (FNS) and the Maintenance and Enhancement (M&E) contract holder to ensure defects and system enhancements are addressed, and the technology remains functional. Warren works with the consortium, and USDA FNS in the development of the annual advanced planning document (APD), and documentation required for the re-procurement of the Crossroads M&E contract.

West Virginia Department of Health and Human Resources (DHHR)

- *Department of Justice (DOJ) Implementation Plan (12/2021 to present)*

Warren provides subject matter expertise and support services to assist DHHR with implementing its five-year plan to improve the continuum of care for children and families, pursuant to DHHR's agreement with the DOJ, now in its second year.

Connecticut Department of Children and Families (DCF) – Adoption/Guardianship Needs Assessment (05/2021 to 08/2021).

Warren served as a subject matter expert for the BerryDunn team performing a gap analysis and current state assessment of DCF's adoption and guardianship program. Project objectives included evaluating strengths and challenges in the current business and technological domains, presenting findings related to the gaps between the current and desired future environments, and providing a roadmap and recommendations to address the identified gaps.

Deloitte Consulting (July 2017 to November 2019).

- **New Hampshire Child Protective Service Intake and Referral**
As a co-functional project lead, Warren lead a proof of concept and business process reengineering project for New Hampshire's Child Protective Services' intake and referral process; a system transfer that leveraged an existing Salesforce configuration, and performed a gap analysis with New Hampshire's legacy system. He facilitated requirements gathering sessions with managers and caseworkers; identified pain points; analyzed legacy system's data model and performed data crosswalk/ fit-gap analysis to the target Salesforce environment; created user stories and wireframes; performed a demo of the enhanced data model and workflows.
- **Delaware Child Care Co-Pay Recalculation Project**
Warren served as functional lead, and led the enhancement of Delaware's child care copay eligibility determination application. He worked with the State and Deloitte's development team in the replacement of existing eligibility functionality-eliminating copays being determined by percentage of household income, implementing the federal mandate of flat monthly co-payments. Warren documented the requirements to the development and testing teams and obtained

approval for functional specifications. He architected and took part in the design, testing and deployment of the new monthly copay system; co-developed test scripts, and oversaw both system integration and user acceptance testing; analyzed overall test results, identified anomalies (instances where copays unusually increased); facilitated daily stand-ups with project team.

- **Rhode Island Integrated Eligibility System Implementation Project**
As a Release Manager, Warren helped stabilize and enhanced the release process for the historically turbulent RI Bridges integrated eligibility project. Warren facilitated ticket prioritization meetings between the State and Deloitte leadership, which culminated in the identification of impactful code fixes that would further stabilize the eligibility system. He collaborated with the offshore development team, providing functional and technical specifications and provided clear and concise written documentation; enhanced the release process by instituting “dry runs” prior to each release; authenticated code changes and ensured defects were not introduced into the production environment; managed scheduled releases and obtained State approval for off-cycle (hot fix) releases; coordinated the tracking of defects prior to releases with functional teams, ensured proper ticket closure; and delivered final release notes.

Public Consulting Group (May 2016 to November 2016). As delivery manager, Warren led the internal Comprehensive Child Welfare Information System (CCWIS) business development initiatives for the Human Services practice. He was co-Project Manager for Virginia's child welfare system replacement project, performing current state assessment and gap analysis; resulting in the development of the State's Planning Advanced Planning Document (PAPD). Warren analyzed industry publications, including the Children's Bureau Child Welfare Outcomes report, and produced a report of states most in need of an improved child welfare information system.

Mediware Information Systems (June 2013 to April 2016).

- **City of Chesapeake and Prince William County (Title IV-E System Replacement Projects)**
Warren led commercial off-the-shelf (COTS) implementations for Title IV-E local government agencies. He led software implementation teams, providing start-to-finish implementation and application of configurable system modules (case, financial, provider, and reporting); aligning to Medicaid, SNAP, TANF, and Title IV-E funded programs. Warren also analyzed clients' existing workflows and service delivery processes; and implemented new processes for alignment with Mediware's child welfare solution. Re-engineered agencies adoption subsidy programs.
- **Georgia Department of Aging Services (DAS) - Home and Community Based Services**
Warren served as the implementation manager, and modernized Georgia's home and

community based services (HCBS) eligibility and case management system by transitioning the state's legacy case management system to Mediware's COTS case management, and intake and referral system. He led requirements gathering sessions, use case development, and system integration and user acceptance testing. Warren utilized an Agile (Scrum) approach, which facilitated an incremental configuration delivery, increased communication and feedback with the project stakeholders; leading to minimized errors in configuration and a successful go-live.

- **Administration for Community Living (ACL) Dept. Health and Human Services**

Warren served as program manager and led an Agile team of eight that maintained ACL's State Reporting (SRT) and Ombudsman Reporting (ORT) tools, managed the work stream and personnel, as well as the annual budget of \$700,000. During this project, Warren facilitated a roundtable discussion with all stakeholders; enhanced data workflow and Standard Operating Procedures; and collaborated with ACL's other partners on the preliminary requirements for the re-design of the AGID (Aging Integrated Database) website.

Rigil Corporation (March 2010 to March 2012). As a management consultant, Warren provided client-facing strategy and consulting services for the Air Traffic Organization (ATO) IT office. Warren led IT transformation and change engagement for the ATO IT – transitioning the organization from siloed business units, to a shared-services environment. Additionally, he managed the day-to-day activities driving business transformation and process optimization, and developed IT strategy, key milestones, and implementation roadmap – leading to IT/ business alignment.

Accenture (October 2007 to July 2009). As the business process outsourcing information manager, Warren managed global operational reporting for six global delivery centers; familiarized himself with all delivery center network's service capabilities, culture, and capacity; rationalized performance scorecards and key performance indicators; and mitigated data inconsistencies. He also maintained the business intelligence and spend analytics dashboard for global procurement transactions, and led requirements workshops with solution architects, sourcing and category managers, and delivery leads. Warren developed a single procurement information management portal; created a 30% time saving for obtaining BPO performance metrics and key performance indicators.

Lisa Roberts

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant (employed full-time with BerryDunn since 2/2021)
Years of Experience Relevant to Proposed Role:	30 years

Overview

Lisa is a highly capable, hands-on leader with demonstrated ability to generate enthusiasm and participation of internal staff and external customers in program improvement efforts. She has deep expertise with public social service programs including TANF, SNAP, CHIP, Medicaid, and developmental disabilities programs.

Experience**BerryDunn (February 2021 to present)**

Lisa has been with BerryDunn since February 2021 and will be focused on providing consulting services for HHS agencies across the country.

Embassy Management, LLC (2009 to February 2021). As Executive Vice-President of Operations and Workforce Services, Lisa was responsible for oversight of four Operating Companies providing services in New Mexico, California, Washington and Oregon. In this role, she provided excellent management of multiple government funding sources and contracts including:

- Medicaid Waiver Services in California, Washington and Oregon.
- Federal TANF funding for a statewide program throughout New Mexico
- County funded services throughout Washington.
- Residential services for individuals with a Developmental Disability in Los Angeles and Sacramento

As part of this work, Lisa successfully reached outcomes and ensured quality services were provided for vulnerable adults. She provided all areas of fiscal management for 11 programs with different funding sources, managing \$35 million in annual revenue. She also evaluated all programs for effectiveness, performance outcomes and coordination of services.

As Vice-President of Workforce Services, Lisa authored the successful proposal to provide statewide TANF workforce services throughout New Mexico. During this time, her accomplishments included:

- Author of the winning statewide proposal to provide TANF employment and case management services.
- Initial contract award was \$8.9M.
- Successful in expanding contracted services to over \$20M annually within three years.
- Developed and implemented subsidized employment services
- Developed and implemented SNAP Employment and Training services
- Excellence in fiscal management, outcomes and quality performance.
- Quality Improvement evaluation and program monitoring and outcomes measurement systems.
- Oversight of statewide services in 42 offices and 250 staff.

As Director of Workforce Services, Lisa provided oversight of workforce services providing employment services for individuals with developmental disabilities and other vulnerable adults. Her responsibilities in this role included:

- Oversight of eight county funded contracts and programs throughout Washington State providing competitive community employment opportunities for individuals with developmental disabilities.
- Oversight of one TANF funded program providing subsidized community employment and educational opportunities for low income adults.
- Exceeded contract performance and budget forecast.

Arbor Education and Training, LLC (Division of ResCare) (2003 to 2009). As Idaho State Director for Enhanced Work Services Program, Lisa provided oversight including fiscal management, contract performance outcomes, and evaluation and improvement for TANF funded services through the Idaho State Division of Welfare. Services were provided in two separate Regions for the State of Idaho. In this role, she exhibited excellence in fiscal management, outcomes and quality performance; conducted quality Improvement evaluation and program monitoring and outcomes measurement systems; and provided oversight of two regional programs with four offices, 50 staff, and \$3 million in annual revenue.

State of Idaho, Division of Welfare (1991 to 2003). During her 13-year tenure with the State of Idaho, Lisa held various positions, in which some of her responsibilities included determining eligibility for SNAP, Medicaid, TANF, Child Care, and Aid to the Aged, Blind and Disabled (AABD). While at the Division of Welfare, Lisa served as Interim Regional Program Manager, Self-Reliance Supervisor, Self-Reliance Trainer, and Eligibility Examiner.

Annie Messinger, CCMP™

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant (employed with BerryDunn since 10/2018)
Years of Experience Relevant to Proposed Role:	12 years
Certifications and Education:	BA, Media Studies, University of Southern Maine Certified Change Management Practitioner™

Overview

Annie is a resourceful, strategic planner with solid problem solving and development skills and a long history of donor acquisitions and stewardship. She has extensive relationship building with clients, donors, volunteers, staff, and community and corporate partners, while using wide range of networking to build on the foundation and growth of an institution.

Relevant Experience

BerryDunn (10/2018 to present). With BerryDunn's State Government Consulting Practice Area, Annie works with state-level agencies in project management and analysis.

- West Virginia Department of Health and Human Resources (DHHR) – DOJ Implementation Plan (05/2019 to present)**
 Annie provides project management and support services to assist DHHR with implementing its five-year plan to improve the continuum of care for children and families, pursuant to DHHR's agreement with the DOJ, now in the second year. Annie helps advise and manage more than 10 DHHR workgroups and other ad hoc groups to reach important deadlines and decisions about realigning child welfare programs and funding. Annie's project management experience supports the client in timely completing critical tasks to help ensure DHHR remains compliant to the DOJ agreement and redesigns its child welfare system in a sustainable way.
- West Virginia DHHR – Safe at Home West Virginia (SAH) Redesign, Implementation, Revenue Maximization, and Monitoring (10/2019 to present)**
 Annie's experience with project management currently supports DHHR's Bureau for Children and Families (BCF) fiscal redesign of the SAH wraparound program for children and families, as the federal funding waiver ended October 1, 2019, pursuant to the federal Family First Prevention Services Act (FFPSA). Annie manages and facilitates several stakeholder workgroups and helps update and maintain State documents in order for the Bureau of Children and Families (BCF) to remain transparent with significant programmatic revisions. Annie's assistance with State documentation updates helped the State successfully

reorganize SAH, including areas such as eligibility, enrollment, and data systems, from a \$30M to a \$13M program, and helped ensure all 10 signed provider contracts were received by the deadline. Annie helps the State monitor and assess the program on an ongoing basis.

- **West Virginia Bureau for Medical Services (BMS) – Payment Error Rate Measurement (PERM) Project (10/2018 to present).**
Annie supports the PERM project, which includes validating errors, research error remedies, and providing oversight for resolution of PERM errors cited for the State.
- **West Virginia Bureau for Public Health – Public Health Accreditation Preparation Project (10/2018 to 06/2019).**
Annie is currently supporting BPH by conducting a gap analysis to assist in BPH's efforts to become accredited by the Public Health Accreditation Board (PHAB).
- **West Virginia Department of Health and Human Resources (DHHR) – Child Welfare Family First Assessment (10/2018 to 06/2019).**
Annie is assisting in the development and analysis of a current state assessment of Child Welfare systems impacted by the Family First Prevention Services Act (FFPSA) and the management of sub-projects to help West Virginia's implementation of the FFPSA.

The Maine Girls' Academy (01/2018 to 07/2018). As director of advancement, Annie worked with executive committee to identify, cultivate, and acquire 10 new major donors of \$5,000 or more (unrelated to student body). She increased board governance by building matrix of needs to help diversify the skills and representation on the board, and by recruiting new, talented members. She grew alumnae support to Annual Fund by securing a \$10,000 challenge gift to match any new and increased giving, and recruited new team of alumnae to solicit classmates to donate. Annie created advancement systems and strategies to finish out the fiscal year, including analyzing alumnae, parent, and grandparent giving trends, and researching donor pools of organizations with like-minded missions. Annie engaged new volunteer group of energetic parents for successful spring auction while minimizing expenses and increasing income.

Wayfinder Schools (03/2017 to 01/2018). As director of philanthropy, Annie engaged long-standing donors to help lead \$225,000 Annual Fund and Corporate Giving. She created and implemented new resource development plan, strategies, and systems with all new executive team of seven. She grew board governance to a functional capacity for resource development. She hired and supervised development assistant and various development initiatives. Additionally, Annie implemented school-wide employee giving

Boys and Girls Clubs of Southern Maine (09/2006 to 03/2017). Annie has served in two main roles for this organization:

- **Director of Development and Marketing.** Annie executed \$3 million capacity campaign

to augment five-year budget forecast, with a dynamic campaign committee and more than 140 donors over three years. She supervised and reviewed the Development Coordinator, part-time Grants Coordinator, and Administrative Assistant. She worked daily with 38 board trustees of all personalities, industries, and work styles, to accomplish mission and strategic goals. She managed six annual fundraising events including a historical spring auction that grossed over six figures, and two events in partnership with a large community partner. She worked with the following trustee-led committees: Executive, Capacity Campaign, Steering, Strategic Planning, Resource Development, Investments, Finance, Marketing, Human Resources, Program, State Alliance, and seasonal events. She collaborated with board and adjunct committee members on a five-year strategic plan and implemented and actively worked to execute the strategic plan. She implemented quarterly scoreboard measurements of marketing initiatives, ranging from event guests and volunteers to long-term donors. She was responsible for fundraising database management and reporting, requiring extensive manipulation of information from Raiser's Edge software. She cultivated, secured, and stewarded major gifts, collaborated with planned giving advisors and donors to grow a \$10 million endowment, and institutionalized annual resource development goals.

- **Development Director.** Annie raised the \$275,000 Centennial Fund over and above annual goals to help celebrate the centennial and cover a three-year budget gap in preparation of the next strategic plan. She led the annual fund, foundations and grants, four special events, and worked with 30 board trustees to meet and exceed fundraising goals. Additionally, she managed as many as 100 volunteers over the course of a year.

Karen Edgecomb, PMP®

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant with BerryDunn since March 2022
Years of Experience Relevant to Proposed Role:	35 years
Certifications and Education:	Bachelor of Arts in Political Science, University of Maine Certified Project Management Professional

Overview

Karen is an experienced consultant with more than 35 years of Child Welfare experience, including extensive experience in the legal aspects of child welfare. She also has 20 years of experience participating, consulting and managing State Automated Child Welfare Information Systems (SACWIS) and Comprehensive Child Welfare Information Systems (CCWIS). Karen has a demonstrated success in human services practice, project management, implementation planning, and change management.

Experience

ICF International Inc. (January 2020 to March 2021). Karen worked as a Senior Technical Writer on Data Quality material and in researching Data Maturity Models. She focused on Data Management Maturity Assessment and the Health Insurance Sharing Maturity Model. She sought documentation from Centers for Medicare and Medicaid Services (CMS), drafted an overview of the topic, and researched and developed a presentation on Change Management methodologies.

MAXIMUS, Inc. (January 2000 to June 2017).

- **North Carolina Department of Health and Human Services – Independent Verification and Validation and Quality Assurance (IV&V/QA) for North Carolina Families Assessing Services through Technology System (NCFAST) (April 2017 to June 2017)**
As a Senior Consultant, Karen contributed to the NCFAST Project by assisting in orienting new MAXIMUS employees. The NCFAST Project included functionality for Child Welfare Services, so she overviewed methodology and modular development.
- **Mississippi Department of Child Protection Services (MDCPS) –IV&V/QA for CCWIS. (February 2014 to March 2017)**
As Project Manager, Karen assisted the MDCPS during the planning and

implementation of its CCWIS. She established controls to ensure quality of deliverables, developed and maintained a detailed IV&V/QA project work plan and schedule, monitored project activities, and provided monthly assessment reports. She facilitated and escalated any IV&V/QA Contractor issues. She reviewed business process workflows and system requirements including functional requirements for interfaces and reporting and gave recommendations to improve those processes.

- **Oregon Department of Human Services – QA of the Oregon Statewide Automated Child Welfare Information System (OR-KIDS) Project (December 2006 to March 2013)**
As Project Manager, Karen provided IV&V/QA services for the procurement and development of the ORKIDS Project. Karen was responsible for coordinating QA activities, ensuring the business needs of the program were represented throughout the system development life cycle, and providing consultation to Senior State Executives (Governance). She assessed the Implementation Vendor's processes by reviewing plans and reporting on execution, participated in project meetings and discussions with the Project Management, Project Team, and other stakeholders, and presented QA Status and Findings to the Executive Steering Committee. She contributed to the development of end-of-phase and end-of-stage QA reports and gave recommendations for contractor deliverables including review of business models, business transition (organizational change) deliverables, communication and training plans.
- **New York State Office of Children and Family Services (OCFS) – QA Services for the New York SACWIS (CONNECTIONS) (April 2008 to June 2008)**
As a Business Analyst and Senior QA Analyst, Karen developed an overarching project strategy for federal issues and assisted with the Advance Planning Document process. Key deliverables included an internal project strategy document and research to support an alternatives analysis.
- **NYC Administration for Children's Services – Agency Modernization Project (September 2007 to April 2008)**
Karen served as a Project Manager and Senior QA Analyst to provide support and consultation for project management and Business Process Modeling. These efforts were structured to achieve Agency objectives related to the Improved Outcomes for Children initiative and to optimize system usage to achieve efficiencies in operations, and improve management and operational reporting capacities.

- **New York State Office of Child Family Services – Project Management and Quality Assurance of the New York SACWIS (January 2000 to June 2005)**
As a Functional Team Lead, Karen provided support, consultation, and QA review activities. She assisted in project planning, requirements definition, logical design, and development of the requirements tracing methods and activities; as well as facilitation of stakeholder meetings.

Maine Department of Human Services Bureau of Child and Family Services (1978 to 2000).
As Director of District Operations: Karen managed eight Child Welfare Districts and their services. She was responsible for the management, stabilization, and enhancement of the Maine Automated Child Welfare Information System (MACWIS) system. She also served as Acting Deputy Bureau Director to integrate the newly-implemented MACWIS into the existing organizational framework of the Department. She was responsible for the ongoing implementation challenges. As a functional Lead, Karen led 30 Department staff in Joint Application Development sessions. She identified, tracked, and provided recommendations to Bureau Management regarding policy and practice issues impacted by the design, development and implementation of new system.

Michelle Weaver

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

Overview

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

Relevant Experience

Opt2Inspire LLC (08/2019 to present)

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

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

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

Chief Operating Officer (04/2014 to 05/2019) – As COO, Michelle provided oversight for day-to-day operations of six subsidiary operating companies providing supported-living, residential habilitation, licensed homes, employment services, day treatment, and behavioral and therapeutic supports in several states. In this role, she managed \$160 million in annual revenue, with approximately 3,400

employees. Additionally, she oversaw program operations; managed development of new services and integration of acquisitions; and maintained relationships with state agencies, counties, and other customers and community partners, including negotiation of reimbursement rates and regulatory changes.

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

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

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

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

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

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

As project manager and process improvement engineer, Michelle planned and executed multiple projects to improve product quality, increase yields, increase production rates, and improve process

safety at a chemical production facility. Additionally, she provided technical assistance in the startup of a new production facility in Mexico, which included living and working in Mexico for three months.

Zara O'Hora

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Subject Matter Expert with BerryDunn
Years of Experience Relevant to Proposed Role:	14 years
Certifications and Education:	Masters of Jurisprudence in Health Law, concentration in Global Compliance & Ethics, Widener University-Delaware Law School Bachelor of Social Work, Eastern University

Overview

Zara is an innovative healthcare executive focused on maximizing company performance and furthering the mission through leading and driving strategic priorities, oversight of Key Performance Indicators (KPIs), and engagement of internal and external stakeholders. She is an exceptional leader, change manager and complex problem solver with extensive experience evaluating performance issues and designing solutions to address key performance metrics

Experience

D&S Community Services (September 2019 to April 2021). Zara worked as Chief Compliance Officer to oversee the Compliance, Quality, and Privacy programs for the company's Medicaid funded services. She designed and implemented the company's Pandemic Response Program by engaging cross-functional leaders, standard operating procedure (SOP), case tracking, monitoring adherence to infection control requirements, and creating new communication methods. Zara created and revised policies and procedures to enhance effectiveness of the compliance program and implemented training initiatives. She provided oversight of incident management processes to support leadership to effectively respond to incidents and reduce risk to individuals, our employees, and the company. She directed ongoing survey readiness activities, reviewed external and internal surveys/audit results and trends, and monitored progress towards completion of corrective action plans. Zara coordinated internal compliance review and monitoring activities, including periodic reviews of compliance risks across functions and business, developed agendas, engaged internal presenters, and facilitated the company's All Hands Call. In her time there, she also chaired the Compliance Review Committee, Quality Management Committee, Privacy & Security Committee, and Strategic Goals Steering Committee.

Bellwether Behavioral Health (March 2017 to September 2019).

- *Chief Compliance Officer (July 2017 to September 2019)*

Zara was responsible for oversight of the Compliance and Ethics program for company's Medicaid funded services. She advised senior leadership on issues concerning Federal health care program requirements, billing, Health Insurance Portability and Accountability Act of 1996 (HIPAA), and quality and risk management matters. She also served as Privacy Officer and consulted with operations to mitigate risks related to privacy and security, provided training, and partnered with IT to monitor compliance. Zara monitored compliance with policies, procedures, and regulatory standards relating to service delivery and quality of care, designed and implemented effective approaches to support continuous monitoring and auditing of operations, and collaborated with senior leadership and operations management to increase efficiency and functional quality through the implementation of new systems, best practices, risk controls and process improvements. She established and cultivated productive relationships with regulatory bodies and managed a large portfolio of projects to support teams, report progress, and influence positive outcomes for key stakeholders.

- ***Director of Relationship Management (March 2017 to June 2017)***
Zara led the planning and development of market strategy to meet annual organic growth targets, documented business processes and analyzed procedures to ensure alignment with changing business needs and built and strengthened partnerships to drive collaboration and engagement with internal and external stakeholders. She developed new processes for referral and admissions resulting in reduced wait time to admission and improved data collection.

National Mentor Healthcare, LLC (February 2008 to February 2017).

- ***Regional Director/Operations Director (September 2010 to February 2017)***
Zara was responsible for oversight of multi-site operations and multiple service lines for Medicaid funded programs including Behavioral Health Services, Treatment Foster Care Services, Community Residential Rehabilitation-Host Homes, and Intellectual and Developmental Disability (IDD) Shared Living & IDD Group Homes Services. She developed objectives for the state that aligned with key business, financial, and quality performance expectations. She developed and maintained relationships with key stakeholders to support current operations and projected growth, assured service delivery and compliance with all regulatory, contractual, corporate, and legal requirements, and co-facilitated the Policy & Procedure Committee. Zara directed wraparound programs to successfully transform from employee base to independent contractor status and supported directors to develop and implement action plans to address systems resulting in improved performance related to billing, quality, daily operations, and finance. She

provided development opportunities for Program Directors through individualized and group trainings, coaching and supervision, and development of performance plans.

- ***State Quality Assurance Manager, (February 2008 to August 2010)***
Zara directed and managed local Continuous Quality Improvement (CQI) program in a Medicaid services environment for six program offices across the state of Pennsylvania. She was responsible for implementation of corporate compliance program and utilized a risk management perspective to manage the incident reporting process including trend analysis, assigned, coordinated. She reviewed Monthly Network Performance Audits and prepared and presented reports and findings from internal audits to the state management team and program managers. Zara provided oversight of implementation of corporate safety initiatives and assisted program offices in preparing for licensing and credentialing visits. She also developed policies, procedures, and best practices to strengthen quality of programs resulting in more consistent processes across program offices, interpreted regulations, bulletins, and contract requirements to assure service delivery compliance, and provided direction to state leadership team and Program Directors on implementation of needed changes.

John Byer

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Subject Matter Expert with BerryDunn
Years of Experience Relevant to Proposed Role:	35 years
Certifications and Education:	Bachelor of Arts, Business Administration, St. Michael's College

Overview

John Byer is a successful IT leader focused on home- and community-based services (HCBS) and long- term services and supports (LTSS) for 35 years. Enhanced through a deep understanding of how HCBS models work, John's skills and track record include stakeholder engagement; workflow design, documentation, and implementation; requirements development and documentation; strategic technology roadmaps and visioning; solution evaluation, selection, and implementation; project management in data and technology for HCBS programs and measures; interoperability services; customer relationship management; market research and trends analysis; and sales and business development.

Experience

Long Term Care Innovation (LTCI) – Chief Executive Officer (March 2016 to present). As Chief Executive Officer for LTCI, John leads complex IT initiatives to define strategic goals; document current- state workflows; envision and document future-state workflows; document requirements; complete market solution surveys; evaluate solutions, including management of procurement processes; map solutions; implement systems; training; and systems administration. He developed and implemented successful managed data integration as a service model to make interoperability possible for LTSS stakeholders.

John has managed partnerships with national and state associations and trade groups for LTSS, has nurtured relationships with federal agencies overseeing LTSS programs, and is a subject matter expert in LTSS data trends. His work includes:

- **Comprehensive Care Connections.** C3 is a Pennsylvania-based corporation formed by community-based HCBS providers as a strategy for success in the State's new MLTSS model. C3 engaged John and a team from LTCI to drive an effort to document current-state and future- state workflows; develop and document system and functional requirements, including multiple billing models; document data elements and parameters; conduct a broad market survey to identify available solutions; and organize and execute a methodical process through which C3 evaluated multiple options for population management, analytics, and integrations, and ultimately selected its preferred

solutions set.

- **Area Agency on Aging District 7.** Area Agency on Aging District 7 in Ohio engaged LTCI to help identify its IT solution for managing patient care transition services. In addition to work similar to that done for C3 above, John and a team from LTCI managed vendor contracting and provided implementation project management, solution mapping, workflow configuration management, invoicing/billing design, implementation and testing, dashboard/measures design and implementation, reports design and implementation, user acceptance testing, and training and ongoing support. LTCI was also retained for ongoing system administration for the new system.
- **Aging Ahead.** Aging Ahead engaged LTCI to lead its strategic technology effort. John and a team from LTCI have provided current-state and future-state workflows; developed system and functional requirements; documented data elements and parameters; identified available solutions; facilitated multiple vendor demonstrations; and overseen a methodical process through which Aging Ahead is evaluating multiple options to meet its strategic goals.

Mediware Information Systems – Vice President (June 2014 to February 2016).

In his roles with Synergy Software Technologies, Harmony Information Systems, and Mediware Information Systems, John worked closely with the Massachusetts Executive Office of Elder Affairs (EOEA), an agency that administers programs from multiple funding sources including the Older Americans Act; Medicaid 1915c Waivers; and state-funded homecare services.

Through a highly consultative relationship over many years, John was able to work with senior executives within EOEA to align technology and data with important policy and operational goals. On multiple occasions, John participated in work groups convened by EOEA senior and management staff to methodically align data and technology with new program initiatives and strategic planning. John was part of a team that repeatedly assisted EOEA—through detailed analysis, process mapping, solution design, development, and implementation—to successfully leverage technology to deliver the data and management tools needed to fulfill objectives.

EOEA successfully supports 4,000+ end users and 200,000+ consumers and is able to leverage data more than 2 million comprehensive in-home assessments (MDS HC) to demonstrate the efficacy of HCBS.

Additional roles:

Harmony Information Systems— Vice President and Director of Sales (October 2007 to June 2014). Synergy Software Technologies – Director of Sales (December 1997 to October 2007).

Thomas Laba, BA

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Subject Matter Expert with BerryDunn
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	BA, Legal Studies, University of Massachusetts, Amherst

Overview

Tom Laba has worked directly with long term services and supports (LTSS) organization specializing in home and community based services since 1999. His responsibilities have spanned a broad range areas related to technology and data including project management, workflow documentation and implementation, requirements documentation, market analysis, solution evaluation, implementation, configuration, and administration.

A skilled consultant, manager, analyst, software product manager, and communicator, Tom's experience with federal, state, and local LTSS stakeholders positions him to add unique value. His skills include software design and specification creation, including requirements development and documentation; stakeholder engagement; workflow design, documentation, and implementation; product management in data and technology for HCBS programs and measures; interoperability services; customer relationship management; market research and trends analysis; and a deep history with the LTSS dataset.

Experience

Long Term Care Innovation (LTCI) – President (March 2016 to present). As President of LTCI, Tom leads complex IT initiatives to define strategic goals, document current-state and future-state workflows, requirements documentation, market solution surveys, solutions evaluation, solutions mapping, system implementation, training, and system administration. He developed and implemented successful managed data integration as a service model to make interoperability possible for LTSS stakeholders. He has led product roadmap creation for enterprise-level solutions designed to align with LTSS market trends, comply with state and federal regulations, and maximize revenue. He is responsible for a next-generation re-write of a suite of LTSS population management solutions, optimized to manage the service coordination of LTSS consumers, facilitate provide contract management, and automate billing. He conducted discovery, market requirement, and focus group base for high profile solutions. He provided project management and executive sponsorship of the execution and implementation. Clients/past work include:

- **Comprehensive Care Connections.** C3 is a Pennsylvania-based corporation formed by

community-based HCBS providers as a strategy for success in the state's new MLTSS model. C3 engaged LTCI, with Tom as project manager, to drive an effort to document current-state and future-state workflows; develop and document system and functional requirements, including multiple billing models; documentation of data elements and parameters; conduct a broad market survey to identify available solutions; organize and execute a methodical process through which C3 evaluated multiple options for population management, analytics and integrations, and ultimately selected its preferred solutions set.

- **Area Agency on Aging District.** Area Agency on Aging District 7 in Ohio engaged Tom and LTCI to help identify its IT solution for managing patient care transition services. In addition to work similar to that done for C3 above, LTCI also managed vendor contracting; provided implementation project management, solution mapping, workflow configuration management, invoicing/billing design, implementation and testing, dashboard/measures design and implementation, reports design and implementation, user acceptance testing, training and ongoing support. LTCI was also retained for ongoing system administration for the new system.
- **Aging Ahead.** Aging Ahead engaged LTCI and Tom as Lead Business and Technical Analyst to guide its strategic technology effort. LTCI's work has included current-state and future-state workflows; development of system and functional requirements, documentation of data elements and parameters; identifying available solutions; facilitating multiple vendor demonstrations and overseeing a methodical process through which Aging Ahead is evaluating multiple options to meet its strategic goals.

Mediware Information Systems – Director (July 2014 to February 2016). In his roles with Synergy Software Technologies, Harmony Information Systems and Mediware Information Systems, Tom was deeply engaged with helping organizations succeed with technology for home and community-based Long-Term Services and Supports and has worked with hundreds of stakeholders nationwide at all levels of the LTSS ecosystem.

His clients included the Massachusetts Executive Office of Elder Affairs (EOEA), an agency that administers programs from multiple funding sources including the Older Americans Act; Medicaid 1915c Waivers; and state-funded homecare services. Tom worked directly on several initiatives including the analysis of a state-wide provider data management system designed reduce operational redundancies between providers and their host agencies, integrate data that historically had resided in separate systems, maximize employee efficiencies and reduce overall costs. The project resulted in the successful creation of a new provider management solution, now used by thousands of users in the state of Massachusetts.

Additional roles:

Harmony Information Systems – Director, Aging Solutions and Technical Services (October 2007 to June 2014)

Synergy Software Technologies – Director of Customer Service (July 1999 to October 2007)

Peter Tiernan

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Subject Matter Expert with BerryDunn
Years of Experience Relevant to Proposed Role:	19 years
Certifications and Education:	Bachelor of Science, Political Science, Northeastern University

Overview

Peter has 19 years of experience as a consultant, CFO, and director of several state agencies. His focus has been in state Medicaid program financial management, oversight, program design and evaluation, policy management, and process redesign. Peter has also led executive sponsorship of IT initiatives over the course of his career.

Experience

HCBS Solutions, LLC (November 2016 to September 2018). As principal, Peter founded HCBS Solutions, an emerging consulting firm dedicated to advancing the availability and efficacy of home- and community-based services for elder individuals. The firm provides strategic development and business consulting services to entities seeking to extend and enhance home care service offerings such as case management, personal care, chore support, home-delivered meals, and transportation.

Massachusetts Executive Office of Elder Affairs (November 2006 to October 2016). As CFO and director of administration and finance, Peter provided leadership in planning, management, and evaluation of department resources in support of the Secretary's priorities. He was responsible for all financial, accounting, and budgetary operations of the department's portfolio, primarily consisting of numerous programs offering home- and community-based services and supports to low-income elders of the Commonwealth. The annual funds under management comprised approximately \$500 million in annual expenditure, and \$130 million in realized revenue. He directed the business operations and amended the uniform business processes associated to the statewide home care program, of which approximately \$250 million was for Medicaid-sponsored services. The statewide program benefits over 40,000 consumers per month, delivering services via an organized care network of 26 nonprofit agencies acting as agents of the department. Peter served as Executive Sponsor for the ongoing development of the system of record, the Senior Information Management System (SIMS).

Due to the onset of the fiscal downturn, Peter implemented funding reduction of approximately \$37.9 million. He worked closely with program managers to mitigate critical impacts to the greatest extent practical. Cost-reduction efforts resulted in the following major

changes:

- Substantial benefit redesign of the State Pharmacy Assistance Program, which offers wraparound coverage to Medicare Part-D drug benefits
- Reduction of home-care program enrollment levels via a risk-based managed intake protocol
- Reduction of Adult Protective Services Investigative Docket via revised case screening tool

Peter served as the Commonwealth's lead expert on the application and implementation of the Balancing Incentive Program, a federally funded initiative that resulted in the Commonwealth realizing \$132 million in funds for enhancing the delivery of home- and community-based services.

He developed the proposal, negotiated the budget process, and implemented significant capacity expansion related to the State Elder Home Care Program (+14 million), Adult Protective Services (+4.7 million), Clinical Eligibility Determinations for Medicaid Long Term Services and Supports (+2.2 million), Options Counseling (+2.5 million), and Supportive Housing (+1.4 million).

Massachusetts Commission Against Discrimination (December 2004 to October 2006). As director of administration and finance, Peter directed and managed all agency administrative and operational functions, most specifically in the areas of budget and finance; management information systems; personnel and payroll administration; customer service and public information; and inter-agency communications. His charge at job commencement was to centralize and improve upon internal operations that were previously handled by various managers and supervisors in a non-administrative division. With such centralization established, Peter was assigned the responsibility of improving investigative case-flow. He improved practices and procedures that resulted in a documented 40% reduction in average case age.

Massachusetts Executive Office of Elder Affairs (January 2003 to June 2004). As chief of staff, Peter served as principal advisor to the Secretary on all major policy and management issues. He coordinated agency initiatives among legal, operations, policy, and external affairs units. He acted as primary liaison to both the Governor's office and major external stakeholders. He was responsible for direct oversight of communications, legislative affairs, and protective services programs. Peter assisted the Secretary in implementing the most significant reorganization in agency's 20-year history, realizing a growth in program responsibility to include oversight of the Medicaid Office of Long-Term Services and Supports.

Massachusetts Office of Consumer Affairs and Business Regulation (August 2000 to December 2002). As human resources director, Peter directed personnel, payroll administration, and labor relations functions for nine state agencies. The operational scope consisted of 800

employees and three collective bargaining units. He managed the service relationship to the nine client agencies and the oversight relationship with the Office of the Governor, the Human Resources Division, and the Office of the State Comptroller. He consulted with agency heads to identify and implement opportunities to improve organizational effectiveness.

Massachusetts Office of Consumer Affairs and Business Regulation (January 1998 to July 2000). As deputy budget director/assistant budget director, Peter was responsible for the financial oversight of nine state agencies. He monitored and forecasted approximately \$60 million in annual expenditures and \$62 million in revenues. He developed annual industry assessments. He responded to inquiries from Governor's Budget Bureau and House and Senate Ways and Means committees. He oversaw the workflow of the assistant budget director and provided operational supervision to agency liaisons. He was involved in all aspects of budget management.

Massachusetts Office of Consumer Affairs and Business Regulation (June 1997 to December 1997). As program administrator, Peter implemented policy directive creating a lemon law arbitration and mediation program. He managed day-to-day operations of the program and responded to inquiries from program participants regarding administrative rules and procedures. He mediated lemon law disputes, developed and implemented program evaluation measures, and drafted and finalized regulatory amendments. Additionally, Peter designed and maintained the case management system.

Lars Loren

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Manager (employed with BerryDunn / Compass Health Analytics since 06/2003)
Years of Experience Relevant to Proposed Role:	22 years
Certifications and Education:	JD, Stanford University AB, <i>magna cum laude</i>, Dartmouth College

Overview

Lars leads BerryDunn's Analytics Practice, overseeing diverse projects, nearly all of which involve health insurance claim data for commercial and Medicaid populations. These projects include data quality control and analysis of APCDs for state government clients, as well as architecture, development, and analysis of data warehouses for provider-sponsored ACOs and nonprofit insurers. More generally, he has wide experience in process analysis and reporting and decision support systems. He has participated in all aspects of this work, from hands-on analysis and design to consultation with senior managers on system selection and organizational development.

Relevant Experience**BerryDunn (06/2003 to present)**

As director of analytics at BerryDunn and the firm it acquired, Compass Health Analytics, Lars analyzes MCO operational and financial planning business processes and consults with MCOs on decision support organization, strategy, architecture, and data design. He has managed system development projects for MCO and disease management firms and designed related databases. He has managed other research projects at the firm and provided analytical input, such as analysis of legislative intent and the impact of mandated insurance coverage on premiums.

ISDM, Inc. (12/1997 to 06/2003)

As a consultant in a small firm with a national practice focused on marketing and CRM systems, IT planning, and process improvement, Lars worked across various projects as an analyst, project manager, and systems and data architect. Among other projects, he managed a project to implement CRM software for a mid-sized investment banking firm and evaluated and recommended changes in a demand forecasting process.

Other Experience

For Advanta Corporation, Lars served as an internal consultant managing project planning and justification to redesign the customer acquisition database and process.

As part of the Maine Legislative Finance Office and the legislative committee staff that reviewed state programs for usefulness, efficiency, and compliance with law, Lars reviewed healthcare profession regulatory agencies and others, facilitated the deliberations of legislative committees, and drafted legislation.

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.

Dina Nash, MPH

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant with BerryDunn since September 2021
Years of Experience Relevant to Proposed Role:	3 years
Certifications and Education:	Bachelor of Arts in Psychology, Harvard University Master of Public Health in Epidemiology and Biostatistics, Boston University

Overview

Dina is a senior consultant with the healthcare analytics practice group who specializes in healthcare data analysis, claims, and clinical data. She has training in conflict communication, delegation, facilitation, and project management and has worked extensively with SAS code, SQL Code, Excel, and PowerBI.

Experience

Mass General Brigham Enterprise Analytics (June 2018 to July 2021). Dina worked as a healthcare data analyst to develop SAS and SQL code for metrics for a complex care program dashboard used by program and hospital leadership. The complex care program was comprised of a diverse patient population, including those on Medicaid and Medicare. She supported patient centered medical home program with creation of advanced primary care strategy metrics, logic, and visuals, and assisted manager with supporting new analysts. She reviewed code written by other analysts. Dina conducted a Deferred Care Analysis due to COVID-19 epidemic that informed state and system wide decision making and led to publication in American Journal of Managed Care. This Deferred Care Analysis was stratified by commercial payers, Medicaid, and Medicare, as well as by select social determinant of health variables.

Partners HealthCare Enterprise Analytics (August 2017 to May 2018). Dina worked as a program analytics intern covering system level Population Health program areas.

Center for Population Health (June 2017 to August 2017). Dina worked as a financial and clinical analytics intern to support the quality team by updating dashboard and exception reports using SAS and Excel. She conducted analysis in SAS on Generalized Anxiety Disorder Screening Measure and created pharmaceutical cost trend driver visuals. Dina also collaborated on healthcare services cost equivalency visual in PowerBI.

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 Entitles – 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, MHCD, 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:	MHCD, Dartmouth College BA, Business Administration, University of Maine at Orono Certified Project Management Professional®

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.

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 in 1997, Jim's experience included 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.

Lloyd Zwicker 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. His IT expertise includes:

- **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, 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, roll-out). 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.

Andrea L. Clark, MS

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

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 multi-million record behavioral health claim databases.

Relevant Experience
BerryDunn HAPA (formerly Compass Health Analytics) (2002 to present)

Andrea conducts quantitative research on various healthcare topics, with a primary focus on public sector behavioral health and topics in healthcare reform. She acts as a HIPAA privacy rule de-identification expert; prepares Medicaid managed care capitation rate bids, and advises Medicaid HMOs on market impacts of major policy and economic shifts; assesses health insurance benefit mandates for state legislatures; and advises state Medicaid agency clients on data quality and analytics.

West Virginia (State) Department of Health and Human Resources (DHHR)

- *Child Welfare Initiatives Project Management Services (06/2020 to present).* Andrea leads the HAPA team supporting the DHHR's Bureau for Children and Families (BCF) in implementing its May 2019 Americans with Disabilities Act (ACA) agreement with the United States Department of Justice (DOJ). She designs and implements analyses and

coordinates efforts to design and build a data reporting system and dashboard to enable the State to reach critical milestones in the agreement.

West Virginia Bureau for Medical Services (BMS)

- *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (06/2020 to present).*
Andrea provides oversight and Medicaid encounter data subject matter expertise to support the State's ongoing initiative to optimize MCO encounter data processes for its risk-based managed care programs.
- *Data Improvement Project (10/2019 to present).* Andrea spearheaded the development of this project and provides strategic oversight and Medicaid data subject matter expertise to this effort. The Data Improvement Project empowers the State to identify, assess, and address data quality and usability issues across the State's Medicaid enterprise data systems by bringing together disparate Medicaid data users and consumers for training and feedback, deep analytical research, and development of process improvement recommendations.
- *Medicaid Management Information System (MMIS) Fee Schedule and Edit Phase II – Outpatient Surgery (04/2019 to 11/2019).* Andrea led a team that analyzed BMS claims data to assess outpatient hospital surgery provider compliance with the BMS outpatient hospital surgery fee schedule, identifying potential cost savings opportunities for the State.
- *Adult Quality Measures Training Grant (10/2017 to 12/2017).* Under a federal grant, the State requested BerryDunn develop, teach, and record an original continuing education curriculum on quality improvement to supplement training and continuing education resources for the BMS Quality Unit team. Andrea developed and presented an original curriculum on data quality, statistics, and health care analytics.
- *Substance Use Disorder (SUD) Waiver Initiative Project (10/2016 to present).* Andrea provides claims and encounter data analysis and Medicaid SUD program expertise supporting the State's expansion of evidence-based care for Medicaid members with opioid use disorder (OUD) and other SUDs.

New Hampshire Insurance Department (NHID)

- *Mental Health Parity Compliance Assurance Plan (CAP) Monitoring (05/2020 to present).*
Andrea is the data analytics lead for this effort overseeing examinations of commercial health insurer mental health provider network adequacy and reimbursement under the federal Mental Health Parity and Addiction Equity Act (MHPAEA) and state parity laws. To test for parity, New Hampshire utilizes innovative, nationally recognized quantitative methodologies developed in collaboration with HAPA using the New Hampshire Comprehensive Health Care Information System (NH CHIS), New Hampshire's APCD.

- **Health Care Analytics (6/2016 to 12/2019).** As the engagement manager for this contract, Andrea collaborated with NHID's health economics and actuarial teams to establish priorities for contract resources and led a team of analysts in designing and implementing a variety of complex analyses of the NH CHIS. Sub-projects included identification of potential targets for fraud, waste, and abuse investigation and recovery; a quantitative study of variances in commercial health insurer provider contracting to inform regulatory decisions to promote consumer value; and the development of a public-facing report on statewide ambulance transportation utilization and expenses in the commercial market.
- **NH CHIS Public Use Data Set Redesign (02/2017 to 11/2017).** In close collaboration with personnel from multiple state agencies, Andrea designed an enhanced public-facing state health care utilization reporting system with strong personal privacy protections. She developed a public-facing Health Insurance Portability and Accountability Act (HIPAA) expert determination report on the effort, implemented the enhancements in a test environment, and presented the proposed enhancements to a stakeholders meeting.

Massachusetts Center for Health Information and Analysis (MACHIA)

- **Prospective Mandated Benefit Reviews prepared for the Massachusetts State Legislature (2004 to present).** Andrea supports MACHIA in meeting statutory obligations to the legislature and informs legislative debate by co-authoring public reports and managing Massachusetts All Payer Claims Database (MA APCD) data analytics for actuarial assessments of proposed Massachusetts state mandated health insurance benefits.
- **Quadrennial Review of State-Mandated Health Insurance Benefits and Health Insurance Costs in Massachusetts (2006 to present).** Andrea led the MA APCD cost analysis and co-authored the 2008, 2013, and 2016 quadrennial editions of this statutorily mandated public-facing report. She currently supervises the MA APCD cost analysis team developing the fourth quadrennial report, expected to be published in 2021.

Community Care Behavioral Health (CCBH)

In support of this Pennsylvania Medicaid behavioral health MCO covering over 1,000,000 lives, Andrea consults to senior management on projected financial effects of Medicaid program changes and major public health events (e.g., COVID-19). In 2002, she was the architect and builder of CCBH's first data warehouse, greatly expanding access within the organization to performance reporting and actionable information. CCBH's decision support department continues to use this original mart structure; the HAPA team continues its role supporting and enhancing the system and providing analytical programming expertise. Andrea led a separate data warehousing, management, and analysis effort enabling CCBH to be the recognized leader in implementing state-mandated efforts to share de-identified physical health, pharmacy, and behavioral health data and improve care coordination between behavioral and physical health

Medicaid MCOs. Starting in 2005, she led HAPA's efforts in support of the preparation of CCBH's capitation rate proposals to the state, including coordinating clinical and actuarial input.

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.

Yang Ji, MPH

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Manager (employed with BerryDunn since 09/2018)
Years of Experience Relevant to Proposed Role:	16 years
Certifications and Education:	Master of Public Health, Biostatistics University of South Florida MS, Demography, East China Normal University BS, Economics, China Youth University of Political Sciences SAS Certified Base Programmer for SAS 9

Overview

With more than 15 years' experience in healthcare data analytics, Yang brings extensive expertise in the application of analytics, business intelligence, and data management to healthcare data ecosystems and financial, utilization, and clinical domains.

Leading BerryDunn's Data Management & Strategy Practice, Yang helps managed care, government, and provider organization clients discover, plan, design, and implement decision support solutions, such as data warehouse and specialized data mart infrastructure, financial, utilization, and quality reporting, and population health analytics.

Relevant Experience

BerryDunn (09/2018 to present). Yang is a senior manager in BerryDunn's Health Analytics Practice Group (HAPG).

- **West Virginia (State) Department of Health and Human Resources (DHHR) Child Welfare Initiatives Project Management Services (11/2020 to present).** Yang leads the HAPG team's design and build of the integrated data store and dashboard system to support the DHHR's Bureau for Children and Families (BCF) in implementing its May 2019 Americans with Disabilities Act (ACA) agreement with the United States Department of Justice (DOJ). He designs the data and reporting architecture and direct the team in building out the system with the purpose of helping enable the State's data and reporting capability in meeting the agreement.
- **Health Insurer and Exchange Participant (09/2018 to present).** Yang serves as a subject matter expert on a project providing technical architecture services to a health insurer and Exchange participant. The project supports revising the insurer's existing data model, developing a more coherent and complete model, initially for operational data centralization and aggregation and subsequently for data warehouse and analytic efforts.
- **Medicaid Behavioral Health MCO (09/2018 to present).** Yang serves as the

- engagement manager/project manager for an enterprise data warehouse and analytics project. The project focuses on the data warehouse, specialized data marts, and reporting/analytics solutions to integrate the client's behavioral health data with state-supplied physical health encounter data. Yang leads the roadmap planning, client's data inventory and processes documentation, stakeholder's data and analytical requirements gathering, and the design, development, and implementation of the data warehouse and analytics data structures.
- **New Hampshire Insurance Department (NHID) (09/2018 to 03/2019).** Yang served as a project manager for a project assisting NHID in evaluating, selecting, and implementing population risk profiling and assessment analysis tools.
Blue Cross Blue Shield of Arizona Advantage (05/2016 to 09/2018). As a senior manager and the head of data analytics and business intelligence, Yang grew and expanded the operations analytics function into enterprise end-to-end data, reporting, and analytics division. He established data integration, storing, and management operations bringing data readiness for reporting and audit requirements from NCQA, CMS, and other government entities. He has chaired reporting review and data management steering committees ensuring enterprise level governance of data analytics operations, strategies, and planning.
Wellcare Health Plans Inc. (08/2010 to 05/2016). As a senior programmer analyst for Actuarial Services and Health Analytics, Yang streamlined monthly SAS financial data mart ETL process, cutting TAT from 4 days to 2 days and reduced process interruption rate from 25% to 5%. He oversaw monthly profitability reporting and led cross functional validation and assembly of revenue and expenditure data for all 11 markets and 26 lines of business, and managed broad data analytics portfolio supporting provider profiling, service grouping, utilization & payment, actuarial reserving, forecasting, risk adjustment, and bids.
Yang also served as a senior business analyst for Operation Analytics, designing and implementing high impact cost analyses and batch claim editing processes that resulted in \$4.5m direct claim overpayment savings during 2011. He coordinated cross functional initiatives to translate claim operation cost saving opportunities into implementable data analytics and automation projects, and engineered and developed collection of SAS programs, Oracle database objects, and Unix scripts for automated custom report delivery, batch claim editing, and job monitoring system.
University of South Florida (07/2005 to 05/2010). As a research associate for the State Data Center on Aging at the Florida Mental Health Institute, Yang led SAS data mart building using Florida Medicaid claims and eligibility data to support Florida Agency for Health Care Administration (AHCA) contracts. He executed study design and inferential statistics generation (logistic regression, multivariate regression, survival analysis, & ARIMA) for cost-effectiveness and health outcome evaluation of Florida Medicaid waiver programs, and co-authored and presented working papers at regional and national conferences.

Donna Friedsam, MPH, PMP®

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Health Policy Manager with BerryDunn since August 2021
Years of Experience Relevant to Proposed Role:	29 years
Certifications and Education:	Master of Public Health in Public Health Policy and Administration, University of Michigan-Ann Arbor Bachelor of Arts, University of Michigan-Ann Arbor Certified Project Management Professional

Overview

Donna is a subject matter expert and seasoned project manager with nearly 30 years' experience working with Medicaid, state agencies, and health care policy and administration. She has a strong background in policy and data analysis, written communications, liaising between parties, and in adhering to federal and local guidelines.

Experience

BerryDunn (2021 to present) Health Policy Manager with diverse project portfolio. Conducts policy and program analyses, and serves as a subject matter expert.

University of Wisconsin (2001 to 2021). Director of Health Policy Programs with subject matter expertise in Medicaid, health coverage programs, health system financing, and outcomes among disparate populations. Led the Medicaid Evaluation, Research, and Technical Assistance group: a team of faculty, staff scientists, and analysts assessing coverage and health insurance reform programs, including federal research and demonstration waivers. Engaged with project stakeholders, managed multi-disciplinary teams of contributors, and researched and analyzed federal and state statute, regulation, and sub-regulatory guidance. Wrote reports, grant proposals, and published work in peer-reviewed journals.

Covering Wisconsin at the University of Wisconsin (2013 to 2019). Executive sponsor of Wisconsin's statewide federally-certified and state-licensed ACA Navigator agency for enrolling consumers in health insurance via the Affordable Care Act Marketplace and in Medicaid/BadgerCare. Managed professional staff located and subcontracting agencies with statewide reach. Oversaw production of the statewide conference, collaborated with the Wisconsin Office of the Commissioner of Insurance and Department of Health Services.

Wisconsin Primary Health Care Association (1992 to 1998). Started as the deputy director and became the executive director, representing federally qualified health centers in state and federal legislative, regulatory, and subregulatory matters, particularly involving Medicaid, Medicare, and federal HRSA funding. Provided technical assistance to health centers in

program and business planning, and the development and operation of their clinics.

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.

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.

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.

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.

Scott Whiting

Proposed Project Role:	Support Staff
Role at BerryDunn:	Project Coordinator with BerryDunn since September 2021
Years of Experience Relevant to Proposed Role:	15 years
Certifications and Education:	Bachelor of Arts in English, Wheaton College

Overview

Scott is an experienced coordinator with a strong ability to grasp new concepts and integrate them into existing systems, eliminate waste, and find solutions that maximize the desired output in every environment. His work with international programs, data strategy and management, and customer service have made him a consistent, meticulous, and responsible problem solver who leaves things in better condition than they were found – be it processes, teams, or organizations. Scott brings both writing skills as well as strong quantitative analysis abilities to project work.

Experience

Revolution Field Strategies (November 2020 to January 2021). Scott worked as a Data Verification Officer to manage data intake and run periodic reports for a petition campaign organized across the State of Maine. He advised managers on the best office floor plan and filing systems to minimize sorting errors during high processing volume and served as a resident Maine geography consultant, suggesting routes for canvassers and compiling a list of municipalities with common alternate names.

Council for International Educational Exchange (June 2014 to April 2020). Scott worked as a Senior Enrollment Coordinator to review and process applications for participants visiting the US on the J-1 visa program. He co-authored the handbook for new employees, produced reports for organization executives on behalf of the Director of Enrollment and Compliance, and worked with the IT department and Business Analysts to design the interface of an in-house CRM database, replacing a legacy platform and 3rd-party software that no longer met industry demands.

Lionbridge (October 2013 to June 2014). Scott worked as an Internet Assessor to analyze search results from competing search engines for landing page quality and utility. He then organized the results by relevance to user intent for any given search query.

Auto Europe LLC (June 2009 to October 2013). Scott worked as a Customer Service Case Investigator to assist clients with post-rental concerns, investigate more complex claims with rental suppliers, and author a flowchart of complaint criteria for staff to minimize unnecessary opening of files, streamlining the department workflow.

Wheaton College (September 2006 to May 2009). Scott worked as a Peer Advisor to discuss the practical aspects of studying in Germany with students. He edited the handbook for students joining the study abroad program and co-coordinated events for the Center for Global Education, such as fairs, dinners, and information sessions. Scott also served as Writing Tutor to guide students through a better understanding of the writing process, which required assessing strengths and weaknesses of papers' arguments and prompting original idea development. He also advised on proper grammar and format for both academic essays and creative writing.

Courtney Rombow, CMP

Proposed Project Role:	Support Staff
Role at BerryDunn:	Consultant with BerryDunn from October 2018 to December 2019; Consultant with BerryDunn since January 2022
Years of Experience Relevant to Proposed Role:	10 years
Certifications and Education:	Certified Officer Manager, National Association of Certified Bookkeepers Diploma in Human Resources, Alison Learning Academy Certified Change Management Practitioner

Overview

Courtney is an experienced project management professional with more than 10 years' experience supporting various teams, offices, and projects. She has demonstrated skills in organization, planning, and training, with a focus in project management support.

Experience

TC Energy (September 2020 to August 2021). Courtney worked as a Project Support Analyst to provide administrative support, collect external labor hours and mileage, and act as document controller o tenure construction documents were collected and managed. She compiled weekly and monthly reports, established and maintained the project repository website, and tracked and reported project status, action items, and risks and issues. Courtney also identified opportunities for improvements and documented lessons learned.

American Roofing Products (December 2019 to August 2020). Courtney worked as a Client Relations Specialist to assess customer concerns, address issues and discrepancies, and solve problems. She maintained current business as well as identifying new business prospects and opportunities for expansions in the customer base. She liaised between groups and individuals, managed schedule and sales goals, and maintained detailed records. She performed necessary collection activities and created vendor incentive program to boost sales and increase client satisfaction.

BerryDunn (October 2018 to December 2019). Courtney worked as a Senior Project Coordinator to assist in preparing presentations, developing and reviewing project deliverables, and conducting research and analysis for various project-related activities and tasks. She facilitated and managed meetings and project-related tracking logs. She acted as proofreader, developed onboarding materials for new hires, and provided orientation and job training. Courtney also maintained staff certifications tracking logs and high priority and confidential

information.

RoadSafe Traffic Control (April 2018 to October 2018). Courtney worked as a Project Coordinator to coordinate upcoming jobs, handle scheduling and dispatching, and coordinator with municipal departments to obtain the correct permits. She performed public relations duties, administrative tasks, and the management of employee licensure to comply with federal and state regulations.

Maxim Crane Works (March 2011 to September 2017). Courtney worked as an Office Manager to oversee transactions and invoices, supervise the administrative staff, and recruited and trained applicants. She organized company events, created onboarding and training materials, and completed performance evaluations.

Erica Hoffman

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

Overview

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

Relevant Experience

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

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

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

Caitlin Cabral

Proposed Project Role:	Support Staff
Role at BerryDunn:	Employed with BerryDunn since September 2021
Years of Experience Relevant to Proposed Role:	3 years
Certifications and Education:	Bachelor of Arts in Psychology, University of Hartford

Overview

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

Experience

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

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

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

University of Hartford's Department of Communication (September 2018 to May 2020). Caitlin worked as an office assistant to streamline faculty responsibilities by completing deliveries, filing documents, and tackling office projects. She monitored departmental computer lab, assisted students, and maintained an environment conducive to productivity. Caitlin also served as a representative for the department at University events.

Carole Ann Guay

Proposed Project Role:	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.

Molly Hawkinson

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

Overview

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

Relevant Experience

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

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

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

Emily Hendrickson

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

Overview

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

Relevant Experience

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

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

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

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

Civil Consultants (09/1999 to 07/2014). As an administrative assistant, Emily provided daily front-desk management of engineering and surveying firm—typing, editing and proofreading proposals, project submittals, and correspondence to clients and governmental agencies; printing and assembling reports; general administrative support. She acted as point of contact for customer inquiries for surveying or engineering needs; assisted clients in retrieving project materials; maintained paper and electronic filing. While there, she was also responsible for graphic design work for projects and advertising.

Gene Paltriner 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.

Bethany Pike

Proposed Project Role:	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.

Jordan Ramsey

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

Overview

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

Relevant Experience

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

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

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

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

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

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

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

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

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

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

Jonathan Williams

Proposed Project Role:	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.

Mary Corley

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

Overview

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

Relevant Experience

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

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

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

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

Janine DiLorenzo

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

Overview

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

Experience

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

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

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

cross sector, citywide coalition that addresses youth education, health, safety, and civic engagement. She led strategic planning process to heighten coalition's impact, calling for comprehensive, coordinated service delivery. She rewrote the mission, vision, and goals to better reflect coalition's purpose. She published a research-based series of indicators for Brockton's Promise to measure the well-being of the city's youth and assess collective impact and also wrote copy for website and social media outreach channels.

- ***AmeriCorps*VISTA, Brockton Parents Magazine (June 2011 to August 2011)***
Janine led all aspects of production for the inaugural issues of Brockton Parents Magazine, in partnership with parent volunteer editorial team. She assigned, wrote, and edited articles; solicited and created advertisements, laid out 32-page full color spreads in InDesign; and completed pre-press packaging procedures for printing. Janine grew a 10,000 copy distribution via businesses, schools, municipal buildings, and social service agencies.

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

Karla Fossett, MFA, Prosci® CCP

Proposed Project Role:	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 copy writer and research master. Her position entailed writing product advertisements, conducting extensive product research, and assisting with product handling and maintenance.