



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: 04-13-2022

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 BMS2200000028 1	Procurement Folder:	1031061
Document Name:	Technical Assistance and Program Support: Phase 4	Reason for Modification:	
Document Description:	Technical Assistance and Program Support: Phase 4		
Procurement Type:	Central Delivery Order		
Buyer Name:	Crystal G Husted		
Telephone:	(304) 558-2402		
Email:	crystal.g.husted@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: \$1,498,400.00

Purchasing Division's File Copy

ENTERED

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

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

Extended Description:

Technical Assistance and Program Support: Phase 4

Dates of Service: 05/01/2022-06/30/2023

Total: \$1,498,400.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$30,100.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2022-05-01	2023-06-30				

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

Lead Project Manager: Base Year One

Hourly Rate: \$215.00

Ed Daranyi: 140 Hours @ \$215.00=\$30,100

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$43,200.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2022-05-01	2023-06-30				

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

Engagement Manager: Base Year One

Hourly Rate: \$270.00

Nicole Becnel: 160 Hours @ \$270.00=\$43,200

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$1,207,500.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2022-05-01	2023-06-30				

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

General Project Manager: Base Year One

Hourly Rate: \$175.00

Ethan Wiley: 600 Hours @ \$175.00=\$105,000

Susan Chugha: 1,575 Hours @ \$175.00=\$275,625

Nicole Spears: 1,575 Hours @ \$175.00=\$275,625

Brody McClellan: 1,575 Hours @ \$175.00=\$275,625

Tonya Roloson: 1,575 Hours @ \$175.00=\$275,625

Total: 6,900 Hours @ \$175.00=\$1,207,500

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$217,600.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2022-05-01	2023-06-30				

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

Extended Description:

Project Management Support Staff: Base Year One

Hourly Rate: \$80.00

Alex Glowacky: 1,360 Hours @ \$80.00=\$108,800
Sam Kessler: 900 Hours @ \$80.00=\$72,000
Bethany Pike: 46 Hours @ \$80.00=\$3,680
Carole Ann Guay: 46 Hours @ \$80.00=\$3,680
Caitlin Cabral: 46 Hours @ \$80.00=\$3,680
Emily Hendrickson: 46 Hours @ \$80.00=\$3,680
Janine DiLorenzo: 46 Hours @ \$80.00=\$3,680
Jon Williams: 46 Hours @ \$80.00=\$3,680
Jordan Ramsey: 46 Hours @ \$80.00=\$3,680
Karla Fossett: 46 Hours @ \$80.00=\$3,680
Mary Corley: 46 Hours @ \$80.00=\$3,680
Molly Hawkinson: 46 Hours @ \$80.00=\$3,680

Total: 2,720 Hours @ \$80.00=\$217,600



April 7, 2022

To Whom It May Concern:

BerryDunn submitted a Staffing Plan and Scope of Work (SOW) document to assist the Bureau for Medical Services (BMS) by providing support for the Technical Assistance and Program Support (TAPS) Project under our contract (CMA # HHR21*03). As stated in the SOW document, the duration of this work is estimated to be 14 months. BerryDunn agrees to a SOW start date effective May 1, 2022.

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

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

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

Best Regards,

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

Eduardo G. Daranyi
Principal
207-541-2244



**Staffing Plan and Scope of Work for the
West Virginia Bureau for Medical Services
Technical Assistance and Program Support: Phase 4 Project
Prepared for HHR #21*03**



Submitted by:

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

Submitted on:

April 7, 2022

berrydunn.com



Staffing Plan and Statement of Work (SOW) for the West Virginia Bureau for Medical Services (BMS) Technical Assistance and Program Support (TAPS): Phase 4 Project

This SOW's intent is to help ensure a common understanding of expectations relating to the deliverables and services BerryDunn will provide for the TAPS Phase 4 Project. The SOW describes the tasks BerryDunn will perform to assist the BMS in providing business analysis and program support. Phase 4 is designed to build upon Phase 3, as the purpose of Phase 4 is to continue project management support of open sub-projects. In addition, Phase 4 will provide ongoing technical support and assistance activities for new initiatives outlined by BMS as part of project initiation.

Background

As part of the TAPS Phase 4 Project, BerryDunn will provide project management, subject matter expertise, and support activities for the design, development, and implementation (DDI) of multiple Medicaid business initiatives and activities that BMS 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, and program development.

1.0 Key Information

West Virginia (State) Department of Health and Human Resources (DHHR) has requested BerryDunn to provide project management services and subject matter expertise. These services will support the TAPS Phase 4 Project in its goal of continuing to provide project management, subject matter expertise, and program support.

- BMS Commissioner Cynthia Beane will serve as project sponsor. Commissioner Beane or her designee will conduct sign-off for deliverables.
- Deputy Commissioner Sarah Young will serve as the primary State point of contact for the project.
- This work is projected to be completed within 14 months of project initiation.
- The BerryDunn leadership team will consist of Nicole Becnel and Ed Daranyi providing project oversight. Ethan Wiley will provide project management.

Assumptions

BerryDunn made the following assumptions in preparing this SOW:

- All project documents, including meeting outcomes, action items, issues, risks, and decisions, will be on the State SharePoint site and brought to the attention of the DHHR Project Sponsor.
- BerryDunn will provide deliverables in an agreed-upon format.



- BerryDunn recognizes that external factors, such as, but not limited to, stakeholder involvement, may impact project timeline, and BerryDunn will work with the State project manager and State project lead to mitigate any such issues as they arise.
- The estimated number of hours reflected in the SOW is based on the assumption that BerryDunn will initiate no more than eight projects as part of sub-project management, outlined in Section 2.0 of this document.

Funding

The State intends to utilize the Medicaid Management Information System (MMIS) Implementation Advance Planning Document (IAPD) (formerly the MITA APD) for the purposes of this SOW. The Centers for Medicare & Medicaid Services (CMS) has previously approved the MMIS IAPD on February 15, 2022, for total state and federal funds in the amount of \$56,989,025 under project identifier WV-2022-01-24-MMIS-MITA IAPDU. The estimated cost of the services to be delivered under this SOW is \$1,498,400 (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.



2.0 Project Scope and Staffing Plan

The table below describes the service approach, deliverables, and acceptance criteria for BerryDunn's work; identifies BerryDunn team members responsible for conducting our work; and lists the estimated hours for completion of each key task. A **deliverable** requires formal submission and approval, while an **artifact** is a document produced by the BerryDunn team during project work that serves as an input to one or more deliverables but might not be formally submitted for State feedback (unless requested). A high-level timeline for the activities described below is provided in Section 5.0.

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

Ref #	Project Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
1.0	Engagement Oversight <u>Proposed Service Approach</u> <ol style="list-style-type: none">1. Ongoing Oversight – BerryDunn's project leadership will meet with the State project sponsor/project manager on a regular basis to discuss project status and issues influencing timely completion of the project work, and oversee BerryDunn staff, services, and quality assurance (QA) of deliverables.2. Monthly Commissioner Briefing – Project status updates will be included in the existing Monthly Commissioner Briefing Report. <u>Deliverables</u> D01: Monthly Commissioner Briefing	Nicole Becnel Ed Daranyi Ethan Wiley Alex Glowacky	195
2.0	Project Execution and Control <u>Proposed Service Approach</u> <ol style="list-style-type: none">1. Provide monthly status updates.2. Coordinate and facilitate project team meetings as necessary.3. Coordinate and facilitate meetings with the BerryDunn project team.4. Manage project action items, risks, and issues. <u>Deliverables</u> D02: Action Item, Risk, Issue, and Decision Logs	Ed Daranyi Ethan Wiley Alex Glowacky	725
3.0	Support for Medicaid Business Initiatives As part of the TAPS Phase 4 Project, BerryDunn may provide support activities for the design, development,	Ed Daranyi Ethan Wiley	2,700



Ref #	Project Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>and implementation of multiple Medicaid business initiatives and activities that BMS will undertake during the period of this SOW.</p> <p><u>Proposed Service Approach</u></p> <ol style="list-style-type: none"> Policy and Program Research – Review, analysis, and provision of subject matter expertise to support successful policy and program operation and transformation. Financial Analysis and Modeling – Designing, developing, and implementing healthcare reform including financing and funding strategies. Regulatory Analysis – Evaluation, planning, and analysis related to opportunities from state and federal regulatory changes to Medicaid, including to existing and new regulations. Waiver Design, Modification, and Implementation – Designing, developing, financing, implementing, or modifying new section 1115 waivers and 1915 waivers or supporting existing waiver programs. Federal and Stakeholder Negotiation – Consultation and guidance on strategies and potential responses during negotiations, as well as facilitating meetings with CMS and other federal or state stakeholders. <p><u>Artifacts</u></p> <ul style="list-style-type: none"> ➤ A01: Impact assessments ➤ A02: Waiver materials ➤ A03: Materials to support federal negotiation 	<p>Susan Chugha Brody McClellan Nicole Spears Tonya Roloson Alex Glowacky Sam Kessler Bethany Pike Carole Ann Guay Emily Hendrickson Jon Williams Jordan Ramsey Karla Fossett Caitlin Cabral Mary Corley Molly Hawkinson Janine DiLorenzo</p>	
4.0	<p>Sub-project Management Program Support</p> <p><u>Proposed Service Approach</u></p> <ul style="list-style-type: none"> Project Management – Ongoing planning, monitoring, executing, and reporting of sub-projects and ad hoc tasks in accordance with project management best practices. Ad Hoc Support – Respond to ad hoc requests as needed. <p><u>Artifacts</u></p> <p>A04: Sub-project Management Materials</p>	<p>Ed Daranyi Ethan Wiley Susan Chugha Brody McClellan Nicole Spears Tonya Roloson Alex Glowacky Sam Kessler Bethany Pike</p>	6,200



Ref #	Project Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
		Carole Ann Guay Emily Hendrickson Jon Williams Jordan Ramsey Karla Fossett Caitlin Cabral Mary Corley Molly Hawkinson Janine DiLorenzo	
5.0	<p>Project Closeout</p> <p><u>Proposed Service Approach:</u></p> <ol style="list-style-type: none">1. Project Closeout Summary – One month prior to the completion of the SOW service dates, begin to prepare a Project Closeout Summary deliverable to document the work performed related to this SOW. The Project Closeout Summary will provide the disposition of deliverables, action items, issues, decisions, and risks.2. Transition – Transition project materials to the project sponsor or his or her designee. <p><u>Deliverables:</u></p> <ul style="list-style-type: none">➤ D03: Project Closeout Summary <p><u>Completion Criteria:</u></p> <p>The Project Closeout Summary deliverable will be deemed complete upon signature acceptance by the BMS Project Sponsor or his or her designee.</p>	Ed Daranyi Ethan Wiley Susan Chugha Alex Glowacky	100
Total Hours			9,920
Total Not-to-Exceed Cost Estimate			\$1,498,400



3.0 Project Resources and Hours

The table below displays additional staffing plan details, total hours, and costs by resource, based on the hourly rates and staffing classifications provided in the Commodity Lines (CLs) for Year 1 in CMA #HHR21*03.

Table 2: Project Resources

CL Year 1	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
2	EM	\$270	Nicole Becnel	160	\$ 43,200
1	LPM	\$215	Ed Daranyi	140	\$ 30,100
4	GPM	\$175	Ethan Wiley	600	\$ 105,000
4	GPM	\$175	Susan Chugha	1,575	\$ 275,625
4	GPM	\$175	Nicole Spears	1,575	\$ 275,625
4	GPM	\$175	Brody McClellan	1,575	\$ 275,625
4	GPM	\$175	Tonya Roloson	1,575	\$ 275,625
5	SS	\$80	Alex Glowacky	1,360	\$ 108,800
5	SS	\$80	Sam Kessler	900	\$ 72,000
5	SS	\$80	Bethany Pike	46	\$ 3,680
5	SS	\$80	Carole Ann Guay	46	\$ 3,680
5	SS	\$80	Caitlin Cabral	46	\$ 3,680
5	SS	\$80	Emily Hendrickson	46	\$ 3,680
5	SS	\$80	Janine DiLorenzo	46	\$ 3,680
5	SS	\$80	Jon Williams	46	\$ 3,680
5	SS	\$80	Jordan Ramsey	46	\$ 3,680
5	SS	\$80	Karla Fossett	46	\$ 3,680
5	SS	\$80	Mary Corley	46	\$ 3,680
5	SS	\$80	Molly Hawkinson	46	\$ 3,680
			Totals:	9,920	\$1,498,400



4.0 Project Hours and Costs Per Month

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

Table 3: Project Costs by Month

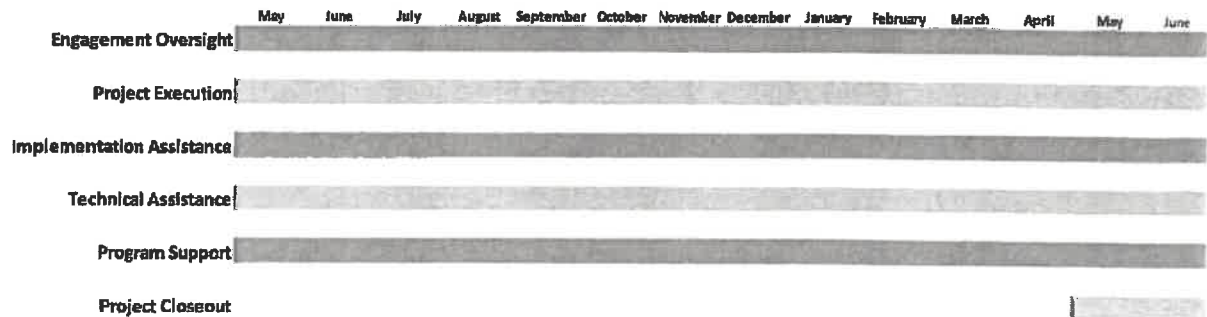
Month #	EM	LPM	GPM	SS	Estimated Hours Per Month	Estimated Cost Per Month
	Hours	Hours	Hours	Hours		
Month 1	12	10	495	195	712	\$ 107,615
Month 2	12	10	495	195	712	\$ 107,615
Month 3	12	10	495	195	712	\$ 107,615
Month 4	12	10	495	195	712	\$ 107,615
Month 5	12	10	495	195	712	\$ 107,615
Month 6	12	10	495	195	712	\$ 107,615
Month 7	11	10	495	195	711	\$ 107,345
Month 8	11	10	495	195	711	\$ 107,345
Month 9	11	10	490	195	706	\$ 106,470
Month 10	11	10	490	195	706	\$ 106,470
Month 11	11	10	490	195	706	\$ 106,470
Month 12	11	10	490	195	706	\$ 106,470
Month 13	11	10	490	190	701	\$ 106,070
Month 14	11	10	490	190	701	\$ 106,070
Total	160	140	6,900	2,720	9,920	\$ 1,498,400



5.0 High-Level Timeline

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

Figure 1: Proposed High-Level Timeline





BerryDunn Authorized Signature

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

Signature

April 7, 2022

Date

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

Sarah Young

Digitally signed by: Sarah Young
DN: CN = Sarah Young email = sarah.k.
young@wv.gov C = AD O = Bureau for
Medical Services OU = Deputy Commissioner
Date: 2022.04.13 12:07:02 -05'00'

Signature

Date



Appendix A: Resumes

Nicole Becnel, PMP

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

Overview

Nicole brings valuable expertise in her field as an experienced Medicaid IT professional with over 15 years of experience. Her experience includes strategic planning, portfolio, program and project management, business analysis, system design, development, and testing for large health information enterprise systems. She is currently working with the State of West Virginia overseeing the State's Medicaid Enterprise and leverage and reuse initiatives.

Relevant Experience

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

- **West Virginia Bureau for Medical Services (BMS).**
 - *West Virginia Portfolio Manager (09/2013 to present).*
In her role as portfolio manager, Nicole provides portfolio management for multiple projects with BMS, including project management of ACA planning, analysis, and advisory services; MMIS, DW/DSS procurement, and project management; E&E systems planning; MITA 3.0 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.

- o **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.

- o **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

**Eduardo Daranyi, MEd, PMP**

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

Overview

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

Relevant Experience

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

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



asset verification system procurement; and other related initiatives.

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

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

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

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

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

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

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

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

BerryDunn was hired by the North Carolina Office of the State Auditor to conduct an independent evaluation of IT projects managed by the North Carolina Office of IT Services' EPMO. Ed served as a lead analyst on this engagement. The objective of our evaluation was to determine whether the EPMO's policies, procedures, and practices were significantly improving the likelihood that a given project would be brought in on time and on budget. This included the review of North Carolina FAST (i.e., Families Accessing Services through Technologies), a program designed to improve the way



North Carolina DHHS and county departments of social services do business.

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

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

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

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

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

Presentations

"Flexible Contracting and Contracting Best Practices," Presentation for MESC 2014, 8/19/2014

**Ethan Wiley, MPPM, PMP, Prosci® CCP, LSSGB**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Manager (employed by BerryDunn since 07/2014)
Years of Experience Relevant to Proposed Role:	7 years
Certifications and Education:	Master of Public Policy and Management, University of Southern Maine Edmund S. Muskie School of Public Service, Concentration in Policy Analysis Certificates of Graduate Study: Applied Research and Evaluation Methods, Performance Management and Measurement, and Social Policy Analysis BA, Political Science and History, University of Maine at Farmington Certified Project Management Professional Prosci® Certified Change Practitioner Certified Lean Six Sigma Green Belt

Overview

Ethan is a manager for our Government Consulting Group with progressive healthcare system experience across the breadth of the Medicaid enterprise. His specialties include 1115 waivers, federal health programs and legislation, health policy and program development, strategic planning, analysis, remediation, and implementation. An experienced project manager in both Medicaid HIT and policy projects, Ethan has engaged in leadership roles in projects designed to evaluate project, program, and provider performance. These efforts have been inclusive of providing support with determining the implications of, and advising on, federal regulation, design of waiver programs, data collection, managed care compliance, waiver evaluation design, and reporting requirements.

Relevant Experience

BerryDunn (07/2014 to present). Ethan has worked across practice areas for BerryDunn's Government Consulting group. Project highlights include the following.

- **West Virginia Bureau for Medical Services (BMS).**
 - *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (06/2019 to present).*
As program manager, Ethan oversees a team, which assists DHHR in meeting compliance with the requirements of the MITA 3.0 State Self-Assessment as prescribed by CMS. The objective of this project is to assist the DHHR with MITA lifecycle maintenance activities, including preparation of the MITA 3.0, SS-A Annual Update for Federal Fiscal Year (FFY) 2018, enterprise-wide MITA



support for ongoing system and business process improvement projects, and training efforts to support activities related to the annual update.

- o *Children with Serious Emotional Disorder 1915(c) Home and Community Based Services (HCBS) Waiver (CSEDW) (09/2018 to present).*

As project manager, Ethan plans and executes the design, negotiation and implementation of a Medicaid HCBS waiver program. The CSEDW provides services that are additions to Medicaid State Plan coverage for CSED who are enrolled in the CSEDW program. The CSEDW permits WV to provide an array of services that enables children who would otherwise require institutionalization to remain in their homes and communities. In addition, it is anticipated that this waiver will reduce the number of children housed both in state and out-of-state in Psychiatric Residential Treatment Facilities (PRTFs) and shorten the lengths of stay for children who require acute care in PRTFs.

- o *Technical Assistance and Program Support Project (11/2018 to present).*
Serving as the overall program manager and subject matter expert Ethan oversees a project as which provides project management, subject matter expertise, and support activities for the design, development, and implementation of multiple Medicaid business initiatives and activities that BMS may undertake. Ethan and his team perform services including, but not limited to, program research, financial analysis and modeling, waiver construction, regulatory analysis, federal and stakeholder negotiation, and program development.

- o *Substance Use Disorder (SUD) Waiver Initiative Project (02/2016 to present).*
Working as the lead policy analyst and subject matter expert for phase 1 of the SUD project, Ethan assisted in the development and successful negotiation of a Section 1115 Demonstration Project to undertake SUD delivery system transformation efforts in West Virginia. Through this Section 1115 Waiver, West Virginia has the opportunity to test innovative policy and delivery approaches to reform systems of care for individuals with SUD.

Serving as the data management lead for phase 2 of the project, Ethan worked to design tools to assist in performance management and measurement, including executive dashboards and quality metrics. In addition, Ethan led reporting efforts and designed processes to conduct actuarial analysis of required budget neutrality components of West Virginia's program.

Serving as program manager for phase 3 of the project, Ethan oversees the project manager and leads. In addition to ongoing implementation of managed care services, reporting requirements, and data analysis to support decision-making, Ethan oversees network adequacy assessments and other efforts to ensure quality program design.



- *Third Party Liability Options Analysis Project (07/2018 to 12/2018).*
As project manager, Ethan determined the research design and methodology to perform an analysis of TPL options. As part of this, the team Ethan led investigated both solution and financing alternatives for the State to conduct their Health Insurance Premium Payment program and Medicaid buy-in programs through new and innovative approaches.
- *Gap Analysis and Project Management Services (10/2016 to 06/2018).*
As project manager, Ethan planned and led the execution of a large-scale ACA compliance effort across West Virginia's Medicaid Enterprise. He provided stakeholders with detailed policy analysis and research deliverables as part of comprehensive support during the life of the project, and oversaw the design and inauguration of seven subprojects created under GAPMS.
- *Adult Quality Measures Grant Project (06/2016 to 12/2016; 06/2017 to 12/2017).*
As project manager, Ethan oversaw a team tasked with collecting and reporting the Medicaid Adult Core Set Measures as BMS transitioned from a grant-funded Quality Unit to a state-supported Quality Unit.
- *ICD-10 Transition Planning and Implementation (07/2014 to 02/2016).*
As policy analyst and project coordinator, Ethan analyzed and remediated 78 distinct policies and overhauled the Provider Manual and Medicaid policy for the agency. He oversaw testing design, system integration testing, and user acceptance testing, along with client acceptance. In addition, he designed, researched, and constructed ICD-10 training modules for BMS staff; designed and built training segments for Medicaid providers and assisted with outreach and engagement; and performed analysis of Medicaid claim data processed through the MMIS to determine financial health and parity in claim operations.
- *Utilization Management and Prior Authorization Services RFP Development Project (09/2015 to 12/2015).*
As business analyst, Ethan was brought in to organize and complete the final development of a state Medicaid agency project to develop a major RFP to select a utilization management vendor.
- **Nebraska Department of Motor Vehicles – Consulting Services to Assist in the Modernization of a Vehicle and Title Registration System (11/2015 to 02/2017).**
As a business analyst, Ethan facilitated stakeholder outreach and engagement, conducted a current state assessment and gap analysis, led requirements definition and planning sessions, and designed, wrote, and revised an RFP for a new Vehicle Title and Registration System.
- **Michigan Department of Education – Early Childhood Data Governance Structure (03/2016 to 06/2016).**
As a business analyst for the Department's data governance project, Ethan developed and drafted initial versions of key deliverables including the data governance manual



and data governance policy. He mapped and developed workflows to outline the progression and flow of data throughout the agency, and outlined critical data questions and paths through which these could be resolved.

- **West Virginia Bureau for Children and Families – Project Management for Enterprise Content Management (ECM) Project (08/2015 to 02/2016).**
Ethan served as substitute project manager on a quality assurance project to oversee the implementation of an enterprise content management solution. He participated in joint application design sessions, coordinated State IT vendors, served as a liaison with multiple state agencies, and facilitated a smooth implementation.
- **Colorado Department of Human Services (DHS) – Child Care Tracking System (CHATS) Needs Assessment and RFP Development (07/2014 to 10/2014).**
Ethan supported BerryDunn's team in conducting a needs assessment and options analysis for a new childcare tracking system for the Colorado Department of Human Services. As part of this project, he researched and analyzed state policy and vendor solutions and supported analysis of future system costs and impacts.

University of Southern Maine, Edmund S. Muskie School of Public Service (09/2013 to 05/2014). As a graduate assistant, Ethan made use of SPSS and other data management tools to work with large data sets. He also assisted with data organization and quantitative analysis, and performed literature reviews and analysis.

Maine Mental Health Partners – CareFirst Program (06/2013 to 09/2013). As an intern, Ethan launched a program to map 59 different service line workflows using Microsoft Visio, adapted those workflows into an electronic health interface to serve a network of providers, and plotted services from five different agencies for adaptation into a digital interface.

The Cutler Institute for Health and Social Policy (11/2012 to 01/2013). Ethan served as a research assistant for the Institute, primarily helping to determine the breadth and effectiveness of Medicaid waivers, studying expansion programs and state plan amendments, performing literature reviews, and assisting with general research.

**Susan Chugha**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant with BerryDunn since 10/2015
Years of Experience Relevant to Proposed Role:	14 years
Certifications and Education:	BA, Business Management, Belmont Abbey College

Overview

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

Relevant Experience

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

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



assisted with the maintenance and management of the MMP site which included uploading files, updating relevant information as needed, ensuring that the appropriate individuals are granted access, and contributing to the design of dashboards and all other aspects.

- ***State Plan Review and Support (SPRS) Project (03/2020 to 11/2020).***
As an analyst for the SPRS project, Susan reviewed an end-to-end version of the State Plan and documented missing or inconsistent details to help the State have more confidence in the Plan. She also reviewed and analyzed sections of the State Plan to help ensure that the pages are in compliance, compared service descriptions to federal and state guidance, and analyzed pages for overall accuracy.
- ***Children with Serious Emotional Disorder 1915(c) HCBS Waiver (CSEDW) (09/2018 to 12/2018).***
As the project coordinator, Susan was responsible for project coordination, which included client outreach, scheduling, notetaking, document review, research, and business analysis. Susan also coordinated and executed multiple public forum events throughout the State of West Virginia.
- ***Provider Enrollment Application (PEA) Project (02/2017 to 11/2017).***
Susan provided project coordination assistance by maintaining all of the meeting management duties, which included scheduling meetings, creating agendas, capturing meeting notes, and tracking action items, risks, and decisions. Susan developed project timelines, managed the document repository, conducted research, and updated necessary documents that were critical to the success of the project, which was to enhance the current WV provider enrollment application process.
- ***ICD-10 Transition Planning and Implementation (10/2015 to 02/2016).***
Susan was responsible for meeting management, as well as maintenance of the document repository for the project. In addition, she attended policy review and workgroup meetings.

Independent Consultant (08/2010 to 10/2014). Susan currently works with her clients to help with event planning, maintaining calendars and contact lists, managing correspondence as well as service provider relationships, scheduling of both professional and personal appointments, and making travel arrangements.

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

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



- **Project Specialist – Assistant Vice President**

- Lead Project Specialist for semi-annual Global Distribution Summits.
- Coordinated all logistics for Asset Management Distribution Group to participate in the Wachovia Championship.
- Lead Project Specialist for annual client event that hosted over 1600 Industry leaders and their families. We had ~\$1.5 trillion dollars in assets under management represented in our client base at this event.
- Partnered with Training & Development team to coordinate internal training programs (on-boarding, sales training, negotiation skills, product training) all around the US and assisted with follow-up after each program to track our successes and determine where improvement was needed.
- Managed the relationship between the portfolio managers/specialists and wholesalers to coordinate communication inquiries and field travel opportunities.
- Partnered with Broker-Dealer National Sales Managers to coordinate divisional meetings and drive sales efforts.
- Managed special projects and events assigned by the President of Evergreen Investments Services Inc. (EISI) and other members of the executive leadership team.

- **Communications Coordinator/Project Manager – Officer**

- Created quarterly newsletters and other publications that were distributed internally.
- Coordinated the Mutual Funds, Sales and Operations (MFSO) program for wholesalers.
- Managed the valued-add and continuing education curriculums that were available to field wholesalers.
- Partnered with Learning and Development Managers to assist in coordination of training programs and on-boarding for new internal and external Wholesalers.

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

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

**Brody J. McClellan, MPA**

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

Overview

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

Experience

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

Independent Consultant (October 2019 to June 2020). Brody served as an independent consultant with broad subject matter specialty in Health Insurance and Public Safety Programs



including Medicaid. He partnered with clients to establish, sustain, and fortify business relationships while leveraging business development opportunities. He offered expertise in program implementation and bridging communication between senior decision makers and technical stakeholders.

Sellers Dorsey & Associates, LLC (October 2017 to October 2019). Brody worked as a senior consultant with scopes of work experience in 16 states. He advised clients including hospital systems, physician practice groups, associations and state Medicaid agencies on a variety of Medicaid subject areas, focusing on Medicaid special financing programs. He also functioned as a Health Policy Specialist, General Medicaid financial and budget specialist, and General advisor on Medicaid Waiver programs (1115 waivers). He created policy documents adopted and used by state governments and developed rate analytics accepted by federal government as methodologically sound.

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

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

**Nicole Spears, MBA**

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

Overview

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

Experience

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

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



Certification Toolkit (MECT) and provided expertise for testing for all subsystems (i.e., test plan, results, and defect review).

SR Advise (January 2016 to December 2017). Nicole worked as the account manager for SR Advise with the goal of growing business in the public health arena. Nicole developed and implemented company policies and procedures to ensure alignment with client contracts and compliance with government and minority business entity regulations. She developed and managed a new internship program to grow a pipeline for future staffing and cultivated relationships with industry and client leadership to grow the business. Nicole also directed the business development strategy and led Request for Proposal (RFP) responses. Her efforts resulted in adding several new clients and contracts valued at over \$2 million in her short time with the company. She also served as a senior consultant on several projects providing comprehensive change management services to meet clients' individual business objectives.

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

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

**Tonya Roloson**

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

Overview

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

Experience

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

St. Catherine's Center for Children (May 2014 to November 2016). Tonya worked as the director of training and staff development to maintain electronic records of staff performance son



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

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

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

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

**Alexandra (Alex) Glowacky**

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Staff Consultant with BerryDunn since July 2021
Years of Experience Relevant to Proposed Role:	4 years
Certifications and Education:	Bachelor of Arts in Sociology, Colby College

Overview

Alexandra is a highly motivated consultant with an interest in the policy decisions and implementation processes surrounding the Medicaid program. She has extensive knowledge in social systems, research and project coordination, and data synthesis. Her strong communication skills paired with her organizational strategies that were developed through work in community organizations, have enhanced her leadership and management knowledge base.

Experience

The American Exchange Project (AEP) (2020 to July 2021). The AEP is a nonprofit start-up and domestic exchange program fostering conversations and connections between American youth from different backgrounds and location. Alexandra worked as a Glauber Fellow & Moderator to facilitate twice weekly meetings of a group of high school students, leading discussions on wide-ranging topics from political debates to role models to personal interests.

Civic Engagement and Community Partnerships Committee (January 2021 to July 2021). Alexandra worked as a student advisor to collaborate in assessing and strengthening working relationships between Colby and local community organizations, developing and implementing engagement-building initiatives. She served as an ambassador for experiences focused on civic learning and democratic engagement.

Education Department Research Team (2020 to July 2021). Alexandra worked as a research assistant looking at intersections of privilege and social justice in elite environments. She conducted qualitative and quantitative analysis, organized focus groups, handled demographic statistics, produced scholarly written report on research, and presented the findings.

Farnham Writers' Center (2018 to July 2021). Alexandra worked as a head tutor, writing fellow, and tutor to provide support for students and professors of writing-oriented courses, orchestrating opportunities for students to improve their writing skills. She maintained and enhanced organization's social media presence on three media platforms. As Head Tutor for campus outreach/community events, she advocated for the organization as a resource, coordinated and ran staff meetings, and advised staff tutors.

Cambridge Women's Center (2018). Alexandra worked as a resource and research intern to investigate and network with other local social service organizations in order to update and revitalize the organization's resource guides. She trained in providing emotional support and relational assistance to trauma survivors.



Colby Cares About Kids (2017 to July 2021). Alexandra worked as an advisory board member and mentor to oversee and provide guidance to a team of 30 mentors working in local schools. She coordinated schedules, recruited/trained new mentors, and contributed to continued mentor development. As a mentor, Alexandra sustained and deepened connection with mentee through weekly visits, providing a consistent and supportive adult presence.



Samuel Kessler

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Subcontractor to BerryDunn since 09/2020
Years of Experience Relevant to Proposed Role:	3 years
Certifications and Education:	BS, Marketing, West Virginia Wesleyan College

Overview

Samuel is an experienced customer service professional, bringing seven years of quality performance in related roles. He is skilled in mentoring team members to deliver exceptional service and building team morale through effective communication and positive performance feedback. His skills include market strategy and management, research and due diligence, pipeline development, business development, and quality assurance.

Relevant Experience

BerryDunn (08/2020 to present). Samuel is a project coordinator for the People's Access to Help (PATH) project and the Children with Serious Emotional Disorder (CSED) project. He has a variety of responsibilities, which include organizing daily meetings for team organization, overseeing daily project coordination activities, developing process flows and scheduling meetings to help ensure adherence to project schedule, providing quality control for meeting materials to satisfy the contract Service-Level Agreements (SLAs). In addition, as part of the CSED project, Samuel tracks decision, interfaces with vendors, assists with the drafting of reports, and supports the project team in a variety of functions.

N3 LLC (05/2018 to 8/2020). Working alongside IBM, Magento, Adobe, and Microsoft, Samuel managed the accounts for SMB/Enterprise level businesses and connected potential and existing customers to senior level account executives. For IBM, this was focused on DB2 and VMware adoption. For Magento and Adobe, this was focused on eCommerce Management Platforms. For Microsoft, Samuel assisted Azure customers with billing and technical issues in an account management position. Currently he drives Teams adoption and utilization as part of the Modern Workplace Team as an I-CSM.

Target (06/2017 to 01/2018). As an electronics sales floor associate, Samuel helped guests with education on devices and products, answering questions, and making sure that each guest's needs were taken care of.

Trojan Landing LLC (05/2013 to 08/2016). As a marine salesperson for Trojan Landing LLC, Samuel assisted customers with their personal recreational vehicle needs, making sure to match each customer with the right product for them. He took them through purchase, title, and financing, and assisted with maintenance and storage needs afterwards. As marketing director, he handled all online sales, digital and print marketing, and event planning and marketing.

**Molly Hawkinson**

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Staff (employed with BerryDunn since 10/2018)
Years of Experience Relevant to Proposed Role:	4 years
Certifications and Education:	BA, Middle East Studies and English Literature, McGill University Dale Carnegie Consultative Sales Training Employee Intercultural Development Program (EIDP)

Overview

Molly is an experienced writer and editor, with a background in project coordination, editing, and research. She works with BerryDunn's consulting teams to review and revise written documentation before being submitted to clients.

Relevant Experience

BerryDunn (10/2018 to present). Molly serves as an editor for BerryDunn's Government Consulting Group, tasked with reviewing client deliverables, marketing communications, and new business development materials for flow, formatting, readability, and accuracy.

Council on International Education Exchange (CIEE) (04/2015 to 07/2018). With CIEE, Molly held the following roles:

- **Teaching English as a Foreign Language (TEFL) Market Research Assistant (06/2018 to 07/2018).** In this role, Molly researched B2B marketing strategies for a new online course, including mediums for engagement with businesses and community schools across the country. She collaborated with TEFL marketing managers to create target market profiles, and provided content for email campaigns targeting college-aged program alumni.
- **TEFL Operations Coordinator (09/2015 to 08/2017).** Molly managed the end-to-end operations for all online courses and overseas programs run by TEFL, in coordination with tutors and platform developers. She designed and proofed collateral for social media and B2C marketing efforts, led all communication efforts, constructed new tools and guides following any platform updates, and supervised content marketing intern tasked with developing enriching material on an editorial calendar.
- **TEFL Outreach Coordinator (04/2015 to 08/2015).** Molly was responsible for customer-facing outreach efforts of CIEE's TEFL department, including targeted emails, sales calls, and social media interaction. She used Salesforce and to track, import, and manage leads and new applicants to the TEFL courses, and contributed tracked lead and enrollment data to subsequent development of sales strategy.

**Emily Hendrickson**

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

Overview

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

Relevant Experience

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

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

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

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



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

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

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

**Jonathan Williams**

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

Overview

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

Relevant Experience

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

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

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

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

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

**Karla Fossett, MFA**

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Technical Writer/Editor (employed full-time with BerryDunn since 11/ 2012)
Years of Experience Relevant to Proposed Role:	4 years
Certifications and Education:	Master in Fine Arts in Creative Writing, Stonecoast MFA Program, University of Southern Maine Bachelor of Science in Film, Boston University College of Communication

Overview

Karla Fossett provides technical writing, project coordination, and SharePoint administration 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. As Technical Writer, she develops and provides QA reviews of project deliverables. In addition, she conducts research, develops workflow diagrams, and prepares and administers web-based surveys. As Administrator for BerryDunn KnowledgeLink, our customized Microsoft SharePoint tool, Karla supports consultants in establishing project work-sites to share project documentation and facilitate secure online communication and collaboration.

Delhaize America (03/2012 to 11/2012). As 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.

**Bethany Pike**

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

Overview

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

Relevant Experience

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

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

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



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

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

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

**Carole Ann Guay**

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

Overview

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

Relevant Experience

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

- **Oregon Enterprise Technology Services (OR ETS) – Integrated IT Service Management (ITSM) (03/2018 to present).**
Carole Ann developed high-level workflow and dataflow diagrams through on-site meetings as well as conference call sessions.
- **Colorado Office of the State Auditor – IT Evaluation (09/2017 to present).**
Carole Ann coordinates document request items, status reports, meeting requests, and data management.
- **New Mexico Corrections Department (NMCD) – COTS Offender Management System (OMS) Replacement (11/2016 to present).**
Carole Ann compiles weekly status reports and participates in interviews as well as survey analysis.
- **Metropolitan Government of Nashville and Davidson County (Metro), TN – Information Security Program Development (05/2016 to present).**
For Metro's, development of their Information Security Management Program, Carole Ann worked as a project coordinator, assisting in the development of findings reports. In addition, she served as part of the team performing a Payment Card Industry (PCI) Readiness Assessment. These activities included identifying Metro's current state of PCI, identifying where PCI data resides and where it traverses the network.
- **Vermont Department of Vermont Health Access – Vermont Health Connect Financial and Programmatic Audit (01/2016 to present).**
BerryDunn has performed the State's financial and programmatic audit of its Health Insurance Exchange for FYE 6/16 and is in the process of performing the FYE 6/17



audit. Carole Ann currently serves as the project coordinator on this audit to determine whether the exchange is in material compliance with 45 CFR 155.

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

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

**Jordan Ramsey**

Proposed Project Role:	Project Management 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.

**Mary Corley**

Proposed Project Role:	Project Management 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:	Project Management Support Staff
Role at BerryDunn:	Editor with BerryDunn since February 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 crosssector, 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.



Caitlin Cabral

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

Overview

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

Relevant Experience

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

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

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

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



Appendix B: Deliverable Dictionary

Table 4: Deliverable Dictionary

Deliverable #	Deliverable Name	Deliverable Description
01	Monthly Commissioner Briefing	A monthly status update for the BMS commissioner.
02	Action item, risk, issue, and decision logs	Logs containing action items, risks, issues, and key decisions respectively. These may be captured during project meetings as during the course of project activities, via correspondence with stakeholders, and at the request of BMS. The logs will be maintained on the BerryDunn project SharePoint site.
03	Project Closeout Summary	The Project Closeout Summary will include an inventory of all project documentation and deliverables being transferred to BMS at the project close. The Project Closeout Summary will also document the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member.



Appendix C: Acronyms/Abbreviations

Table 5: Acronyms/Abbreviations

Acronym/ Abbreviation	Definition
APD	Advance Planning Document
BMS, State	Bureau for Medical Services
CMS	Centers for Medicare & Medicaid Services
DDI	Design, Development, and Implementation
DHHR	Department of Health and Human Resources
FFP	Federal Financial Participation
FFS	Fee for Service
GPM	General Project Manager
HCBS	Home and Community Based Services
IAPD-U	Implementation Advance Planning Document Update
LPM	Lead Project Manager
MITA	Medicaid Information Technology Architecture
MMIS	Medicaid Management Information System
PMP®	Project Management Professional®
PRTF	Psychiatric Residential Treatment Facility
QA	Quality Assurance
SME	Subject Matter Expert
SOW	Scope of Work
SPA	State Plan Amendment
SS	Support Staff
WV	West Virginia