



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: 04-21-2022

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 BMS2200000029 1	Procurement Folder:	1032019
Document Name:	ARP Act of 2021, Section 9817 HCBS Implementation Project	Reason for Modification:	
Document Description:	ARP Act of 2021, Section 9817 HCBS Implementation Project		
Procurement Type:	Central Delivery Order		
Buyer Name:	Crystal G Hustead		
Telephone:	(304) 558-2402		
Email:	crystal.g.hustead@wv.gov		
Shipping Method:	Best Way	Master Agreement Number:	CMA 0511 HHR2100000003 1
Free on Board:	FOB Dest, Freight Prepaid		6-14-2021

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: James W Atkins Requestor Phone: (304) 356-2056 Requestor Email: james.w.atkins@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: \$1,807,140.00

Purchasing Division's File Copy

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

ENTERED

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

Extended Description:

American Rescue Plan Act of 2021, Section 9817 Home and Community Based Services Implementation Plan Project

Dates of Service 5/9/2022 - 04/08/2024

Total. \$1,807,140.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$39,560.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-09	2024-04-08				

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

Lead Project Manager: Base Year One

Hourly Rate: \$215.00

Ed Daranyi 184 Hours @215 = \$39,560

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$49,680.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-09	2024-04-08				

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

Engagement Manager: Base Year One

Hourly Rate: \$270.00

Nicole Becnel 184 hours @ \$270 = \$49,680

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$1,347,500.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-09	2024-04-08				

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

General Project Manager: Base Year One

Hourly Rate: \$175.00

Susan Chugha 3,050 hours @ \$175 = \$533,750
Ethan Wiley 720 hours @ \$175 = \$126,000
Kristan Drzewiecki 1,250 hours @ \$175 = \$218,750
Hilary Foster Moles 2,680 hours @ \$175 = \$469,000

Total 7,700 hours @ 175 = \$1,347,500.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$370,400.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2022-05-09	2024-04-08				

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 2,080 Hours @ \$80 = \$166,400.00
 Samuel Kessler 1,550 Hours @ \$80 = \$124,000
 Bethany Pike 100 Hours @ \$80 = \$8,000
 Carole Ann Guay 100 Hours @ \$80 = \$8,000
 Emily Hendrickson 100 Hours @ \$80 = \$8,000
 Jon Williams 100 Hours @ \$80 = \$8,000
 Jordan Ramsey 100 Hours @ \$80 = \$8,000
 Karla Fossett 100 Hours @ \$80 = \$8,000
 Mary Corley 100 Hours @ \$80 = \$8,000
 Molly Hawkinson 100 Hours @ \$80 = 8,000
 Caitlin Cabral 100 Hours @ \$80 = \$8,000
 Janine DiLorenzo 100 Hours @ \$80 = \$8,000

Total: 4,630 Hours @ \$80 = \$370,400



April 14, 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 Home and Community-Based Services (HCBS) Project under our contract (CMA # HHR21*03). As stated in the SOW document, the duration of this work is estimated to be 23 months. BerryDunn agrees to a SOW start date effective May 9, 2022. Assuming a start date of May 9, 2022, the work would then conclude on April 8, 2024.

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

We are pleased to have the opportunity to 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 Department of Health and Human Resources and
Bureau for Medical Services**

**American Rescue Plan Act of 2021, Section 9817 Home and Community
Based Services (HCBS) Implementation Plan Project
Prepared for CMA #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 14, 2022

berrydunn.com



Staffing Plan and Scope of Work for the West Virginia Department of Health and Human Resources, Bureau for Medical Services American Rescue Plan Act of 2021, Section 9817 Implementation Project

This scope of work (SOW) describes the tasks BerryDunn will perform to assist the West Virginia (State) Department of Health and Human Resources (DHHR) and Bureau for Medical Services (BMS), with additional support for implementing and revising Medicaid Home and Community Based Services (HCBS) and program following the approval of the West Virginia Spending Plan for Implementation of American Rescue Plan (ARP) Act of 2021, Section 9817. This SOW is henceforth referred to as the ARP Act of 2021, Section 9817 Implementation Project SOW.

Background

Over the past decade, the State of West Virginia has made great strides in reforming and improving Medicaid HCBS. The March 2021 ARP allowed enhanced federal funding for State Medicaid spending on HCBS. Section 9817 of the ARP provided the State with a one-year, 10 percentage point increase in its Federal Matching Assistance Percentage (FMAP) for certain Medicaid HCBS expenditures. This 10 percentage point increase applied to HCBS expenditures provided between April 1, 2021, and March 31, 2022. The extended time period for enhanced funding has provided West Virginia with the opportunity to design and implement short-term activities to strengthen the HCBS system in response to the COVID-19 Public Health Emergency (PHE), as well as longer-term strategies that enhance and expand the HCBS system and sustain effective programs and services.

The State of West Virginia has outlined three major areas of investment using ARP funds:

Sustainability of the Direct-Care Workforce. One of the longer-term strategies for strengthening HCBS systems is investing in improving recruitment and reducing turnover among frontline staff. Staffing shortages and high turnover are among the most frequently reported provider challenges. Training and rate increases will be passed through to direct-care staff in the form of compensation increases, with the intent of providing short-term relief to help ensure provider solvency, and a wage increase to both reward and retain committed direct-care staff.

Enhancing and Strengthening the HCBS Service Array. Another strategy the State is incorporating to augment the HCBS will be to include additional member slots for the 1915(c) waiver programs. The ability to enhance these programs provides an abundance of opportunities for West Virginians who are in need of care in a secure, safe, and natural setting within their homes and communities.

Supportive Health Information Technology (HIT). The State is looking to improve HCBS through different HIT pathways. First, the State will implement a new online case



management system to improve coordination of care. Second, the State will upgrade the Incident Management System.

1.0 Key Information

The intent of this document is to help ensure a common understanding of expectations relating to the deliverables and services BerryDunn will provide for the ARP Act of 2021, Section 9817 Implementation Project.

Estimates for this SOW are based on the following assumptions:

- All project documents—including meeting outcomes, action items, issues, risks, and decisions—will be on the BerryDunn SharePoint site and will be brought to the attention of the BMS project sponsor. All team members will be granted access to the SharePoint site.
- Deliverables will be provided in an agreed-upon format.
- The State leadership team will consist of Commissioner Cynthia Beane as the BMS project sponsor, Randy Hill and Cynthia Parsons as the BMS project leads, and Becky Manning as the BMS Finance project manager.
- The State project leads will provide timely decision-making and responses to information requests from the BerryDunn project team.
- 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 \$1,807,140 (included in the approved APD). Therefore, any additional scope that is added to the services to be provided under this SOW may require that the State update its MMIS IAPD to allocate additional funds for project management.
- The BerryDunn leadership team will consist of Nicole Becnel as engagement manager, Ed Daranyi as portfolio manager, Ethan Wiley as the program manager, and Susan Chugha providing project management.
- This work will begin upon approval of this SOW and on a mutually agreed-upon date, and is projected to continue for 23 months.



2.0 Project Scope and Staffing Plan

The table below describes the service approach, deliverables, and acceptance criteria for BerryDunn's work, identifies BerryDunn team members responsible for conducting the work, and lists the estimated hours for completion of each key task. A high-level timeline for the activities described below is provided in Section 5.0.

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

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
1.0	<p>Engagement Oversight</p> <p><i>Service Approach</i></p> <p>BerryDunn's leadership team will provide oversight and coordination of BerryDunn staff, services, and deliverables.</p> <p>BerryDunn's project leadership will meet with the BerryDunn project lead and other key team members on a regular basis to discuss project status and issues impacting timely completion of the project work, and oversee BerryDunn staff, services, and review of deliverables.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none">Deliverable D01: Monthly Commissioner Briefing <p><i>Completion Criteria</i></p> <p>Engagement Oversight will be deemed complete upon signature acceptance of Deliverable D11: Project Closeout Summary by the DHHR project sponsor or his/her designee.</p>	Nicole Becnel Ed Daranyi Ethan Wiley Susan Chugha	434 hours
2.0	<p>Project Initiation</p> <p><i>Service Approach</i></p> <p>Upon project initiation, BerryDunn will host a project kickoff meeting. In support of Project Execution and Control, BerryDunn's leadership will meet with the project sponsor on a regular basis to discuss project status and issues impacting timely completion of the work, and will oversee BerryDunn staff, services, and deliverables. Project Execution and Control will also include:</p> <ul style="list-style-type: none">Facilitating meetings, preparing meeting materials, and taking notes for BerryDunn- and	Ed Daranyi Ethan Wiley Susan Chugha Kristan Drzewiecki Hilary Foster Moles Alex Glowacky Samuel Kessler	2,039 hours



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>State-owned meetings</p> <ul style="list-style-type: none">• Preparing monthly project status updates, risks, issues, and briefings for the State leadership team• Managing project logs (action item, decision, issue, and risk tracking)• Storing project documentation repository in an agreed-upon SharePoint location <p>Deliverable(s)</p> <ul style="list-style-type: none">• Deliverable D02: Monthly Status Reports• Deliverable D03: Project Schedule• Deliverable D04: Project Kickoff Presentation <p>Completion Criteria</p> <p>Project Initiation will be deemed complete upon successful completion of the project and signature acceptance of Deliverable D11: Project Closeout Summary by the DHHR project sponsor or his/her designee.</p>		
3.0	<p>Project Execution and Control</p> <p>Service Approach</p> <p>BerryDunn will perform the following tasks to assist with activities that will enhance HCBS throughout the State:</p> <ol style="list-style-type: none">1. Create a timeline to track and monitor project milestones and tasks with updates, as needed2. Create a Spending Tracker to follow the status and development of initiatives under Section 9817 of the ARP3. Facilitate project kickoff meeting with detailed presentation deck, meeting notes, action items, and approach for the project <p>Deliverable(s)</p> <ul style="list-style-type: none">• Deliverable 05: Project Timeline• Deliverable 06: Project Tracker <p>Completion Criteria</p>	<p>Ed Daranyi Ethan Wiley Susan Chugha Kristan Drzewiecki Hilary Foster Moles Alex Glowacky Samuel Kessler</p>	100 hours



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	The Project Execution and Control phase of the project will be deemed complete upon delivery of Deliverable D11: Project Closeout.		
4.0	<p>Planning and Implementation</p> <p><i>Service Approach</i></p> <p>BerryDunn will perform the list of following tasks to assist with activities that will enhance the HCBS throughout the State:</p> <ul style="list-style-type: none">• Conduct planning meetings with the State, including meeting agendas, notes, tracking over action items, decisions, and issues/risks• Service Design – develop and implement updates to current and new HCBS services• Develop new HCBS services and/or systems improvements• Implement strategies for stakeholder engagement• Collaborate with other DHHR agencies and stakeholders on new and enhanced HCBS services• Benefit Design – Policy and State Plan Amendment development and updates• Community and Member Integration Planning examples include draft and design member communications, flyers, emails blasts, educational materials, staff training, etc.• Oversee Provider Rate Setting and One-Time Direct-Care Worker Incentives• Develop and oversee State deliverables to federal partners:<ul style="list-style-type: none">◦ Quarterly HCBS Spending Plan to CMS◦ Quarterly HCBS Spending Narrative to CMS <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none">• Deliverable 07: Project Coordination Artifacts (meeting agendas, notes, action items, risks/issues log, decisions log) <p><i>Completion Criteria</i></p>	<p>Ethan Wiley Susan Chugha Kristan Drzewiecki Hilary Foster Moles Alex Glowacky Samuel Kessler Bethany Pike Carole Ann Guay Emily Hendrickson Jon Williams Jordan Ramsey Karla Fossett Mary Corley Molly Hawkinson Caitlin Cabral Janine DiLorenzo</p>	4,895 hours



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	The Planning and Implementation phase of the project will be deemed complete upon delivery of Deliverable D11: Project Closeout.		
5.0	<p>Reporting Assistance</p> <p><i>Service Approach</i></p> <p>BerryDunn will perform the following tasks as they relate to reporting requirements under Section 9817 of the ARP to enhance, expand, or strengthen HCBS:</p> <ul style="list-style-type: none"> • Preparation of quarterly HCBS spending plan reports disclosing anticipated and/or actual expenditures for State activities • Preparation of quarterly HCBS spending plan narrative reports that will serve as a progress report on activity updates • Revisions to submitted reports, if necessary • Technical assistance in response to questions/comments after report submissions <p><i>Deliverable(s)</i></p> <p>D08: Quarterly HCBS Spending and Narrative Plans</p> <p><i>Completion Criteria</i></p> <p>The Reporting Assistance phase of the project will be deemed complete upon delivery of Deliverable D11: Project Closeout.</p>	<p>Ethan Wiley</p> <p>Susan Chugha</p> <p>Kristan Drzewiecki</p> <p>Hilary Foster</p> <p>Moles</p> <p>Alex Glowacky</p> <p>Samuel Kessler</p> <p>Bethany Pike</p> <p>Carole Ann Guay</p> <p>Emily Hendrickson</p> <p>Jon Williams</p> <p>Jordan Ramsey</p> <p>Karla Fossett</p> <p>Mary Corley</p> <p>Molly Hawkinson</p> <p>Caitlin Cabral</p> <p>Janine DiLorenzo</p>	2,600 hours
6.0	<p>Research and Analysis</p> <p><i>Service Approach</i></p> <p>BerryDunn will assist with research and analysis requests related to the ARP HCBS initiatives and tasks. Below is a list of activities BerryDunn will conduct, but are not limited to:</p> <ul style="list-style-type: none"> • Analysis of federal guidance rules and/or programmatic changes • Program-, service-, and policy-related research opportunities • Research on current market trends <p><i>Deliverable(s)</i></p>	<p>Ethan Wiley</p> <p>Susan Chugha</p> <p>Kristan Drzewiecki</p> <p>Hilary Foster</p> <p>Moles</p> <p>Alex Glowacky</p> <p>Samuel Kessler</p> <p>Bethany Pike</p> <p>Carole Ann Guay</p> <p>Emily Hendrickson</p> <p>Jon Williams</p>	1,500 hours



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	D09: Research Summaries <i>Completion Criteria</i> The Research and Analysis phase of the project will be deemed complete upon delivery of Deliverable D11: Project Closeout.	Jordan Ramsey Karla Fossett Mary Corley Molly Hawkinson Caitlin Cabral Janine DiLorenzo	
7.0	HCBS Subproject Assistance <i>Service Approach</i> BerryDunn will assist with ARP HCBS subprojects as requested by the State. Each subproject will be defined, initiated, controlled and closed through subproject governance agreed upon with the project sponsor or their designee. Activities may include, but are not limited to: <ul style="list-style-type: none"> Plan and execute up to three subprojects in support of the BMS Office of HCBS Research and analyze the proposed subject matter Schedule and facilitate meetings with stakeholders to uncover objectives and goals Develop work plans to support the subproject activities and timeline Assist with the development of training plans, if applicable <i>Deliverable(s)</i> <ul style="list-style-type: none"> Deliverable 10: Subproject Timelines and Staffing Plans <i>Completion Criteria</i> HCBS Subproject Assistance will be deemed complete upon delivery of Deliverable D11: Project Closeout.	Ed Daranyi Ethan Wiley Susan Chugha Kristan Drzewiecki Hilary Foster Moles Alex Glowacky Samuel Kessler Bethany Pike Carole Ann Guay Emily Hendrickson Jon Williams Jordan Ramsey Karla Fossett Mary Corley Molly Hawkinson Caitlin Cabral Janine DiLorenzo	1,100 hours
8.0	Project Closeout BerryDunn will prepare a Project Closeout Summary that includes an inventory of all project documentation and deliverables being transferred to BMS at project close. Additionally, the summary will document the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State	Ed Daranyi Ethan Wiley Susan Chugha Kristan Drzewiecki Hilary Foster Moles	30 hours



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>operations team member.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none">• Deliverable 11: Project Closeout Summary <p><i>Completion Criteria</i></p> <p>BerryDunn services will be considered complete when the State project sponsor or his/her designee formally accepts and signs Deliverable D11: Project Closeout Summary.</p>	<p>Alex Glowacky</p> <p>Samuel Kessler</p> <p>Bethany Pike</p> <p>Carole Ann Guay</p> <p>Emily Hendrickson</p> <p>Jon Williams</p> <p>Jordan Ramsey</p> <p>Karla Fossett</p> <p>Mary Corley</p> <p>Molly Hawkinson</p> <p>Caitlin Cabral</p> <p>Janine DiLorenzo</p>	
Total Hours			12,698
Total Not-To-Exceed Cost Estimate			\$1,807,140



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	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
2	EM	\$270/hour	Nicole Becnel	184	\$49,680.00
1	LPM	\$215/hour	Ed Daranyi	184	\$39,560.00
4	GPM	\$175/hour	Susan Chugha	3,050	\$533,750.00
4	GPM	\$175/hour	Ethan Wiley	720	\$126,000.00
4	GPM	\$175/hour	Kristan Drzewiecki	1,250	\$218,750.00
4	GPM	\$175/hour	Hilary Foster Moles	2,680	\$469,000.00
5	SS	\$80/hour	Alex Glowacky	2,080	\$166,400.00
5	SS	\$80/hour	Samuel Kessler	1,550	\$124,000.00
5	SS	\$80/hour	Bethany Pike	100	\$8,000.00
5	SS	\$80/hour	Carole Ann Guay	100	\$8,000.00
5	SS	\$80/hour	Emily Hendrickson	100	\$8,000.00
5	SS	\$80/hour	Jon Williams	100	\$8,000.00
5	SS	\$80/hour	Jordan Ramsey	100	\$8,000.00
5	SS	\$80/hour	Karla Fossett	100	\$8,000.00
5	SS	\$80/hour	Mary Corley	100	\$8,000.00
5	SS	\$80/hour	Molly Hawkinson	100	\$8,000.00
5	SS	\$80/hour	Caitlin Cabral	100	\$8,000.00
5	SS	\$80/hour	Janine DiLorenzo	100	\$8,000.00
			Total Hours:	12,698	\$1,807,140

EM = Engagement Manager

LPM = Lead Project Manager

GPM = General Project Manager

SS = Support Staff



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

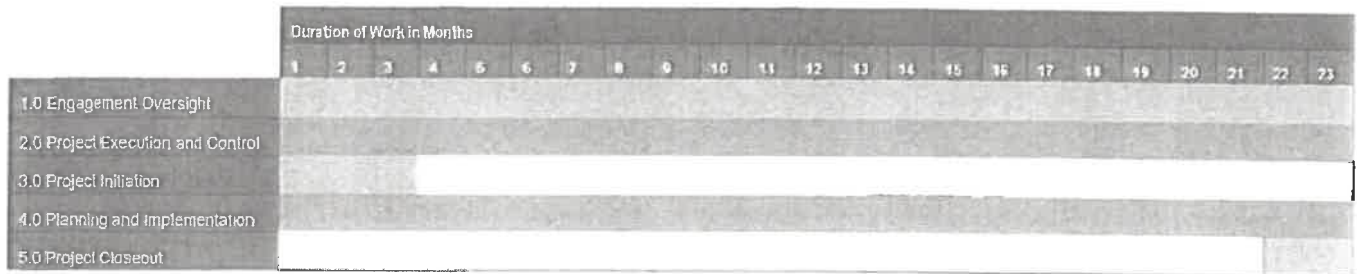
Month #	EM	LPM	GPM	SS	Estimated Hours Per Month	Estimated Cost Per Month
	Hours	Hours	Hours	Hours		
Month 1	10	10	400	200	620	\$90,850
Month 2	10	10	500	300	820	\$116,350
Month 3	10	10	500	300	820	\$116,350
Month 4	8	8	500	300	816	\$115,380
Month 5	8	8	500	300	816	\$115,380
Month 6	8	8	500	300	816	\$115,380
Month 7	8	8	500	300	816	\$115,380
Month 8	8	8	500	300	816	\$115,380
Month 9	8	8	400	200	616	\$89,880
Month 10	8	8	400	200	616	\$89,880
Month 11	8	8	300	180	496	\$70,780
Month 12	8	8	300	180	496	\$70,780
Month 13	8	8	300	180	496	\$70,780
Month 14	8	8	300	180	496	\$70,780
Month 15	8	8	200	180	396	\$53,280
Month 16	8	8	200	180	396	\$53,280
Month 17	8	8	200	130	346	\$49,280
Month 18	8	8	200	120	336	\$48,480
Month 19	8	8	200	120	336	\$48,480
Month 20	6	6	200	120	332	\$47,510
Month 21	6	6	200	120	332	\$47,510
Month 22	6	6	200	120	332	\$47,510
Month 23	8	8	200	120	336	\$48,480
Total	184	184	7700	4630	12,698	\$ 1,807,140



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 Government Consulting Group, I have reviewed this SOW and am legally authorized to commit BerryDunn to the work as described herein. The work and level of effort is a not-to-exceed cost. Work to be invoiced to DHHR will be for actual hours expended, which may or may not equal the projected level of effort, but will not exceed the projected level of effort.

Signature

April 14, 2022
Date

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

Cynthia Beane, MSW,
LCSW

Digitally signed by: Cynthia Beane, MSW, LCSW
DN: CN = Cynthia Beane, MSW, LCSW email = cynthia.e.
beane@wv.gov C = US O = Medical Services OU = WV DHHR
Date: 2022.04.15 09:33:01 -05'00'

Signature

04/15/2022
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.

- *5010 Refresh Project (10/2011 to 08/2013).*

Nicole served as project manager for the successful implementation of the 5010/D.0 standards required by federal mandate. In this role, Nicole supported the Bureau with her project management and subject matter expertise during the conversion of HIPAA Accredited Standards Committee (ASC) X12 version 4010A1 to ASC X12 version 5010 and National Council for Prescription Drug Programs (NCPDP) version 5.1 to NCPDP version D.0. This work included project management of deliverable review, SME advisory services, UAT plan assistance, operational readiness assessment, and post implementation project management and monitoring.

- *Data Warehouse / Decision Support System (DW/DSS) Project Management (06/2010 to 06/2011).*

Nicole served as the project manager to assist the State with the development of procurement documentation for the DW/DSS re-procurement. In this role, Nicole was responsible for managing the project team, serving as liaison with the Bureau, reviewing project deliverables, and providing subject matter knowledge and support.

- **New Jersey Division of Medical Assistance and Health Services – MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 01/2018).** As Engagement Manager, Nicole oversaw the BerryDunn team working in collaboration with the New Jersey Implementation Team Organization (ITO) for the Replacement MMIS (R-MMIS). In her role, she was responsible for the oversight of the Leverage and Reuse, Testing and Certification project activities.

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

- **Project Manager for MIHMS Provider Enrollment.** Nicole served as Project Manager and SME for the Maine DHHS provider re-enrollment and maintenance implementation project, which created an online tool for enrollment, re-enrollment, and maintenance for Maine's provider community consisting of approximately 8,000 providers. Nicole managed large and complex configuration projects and provided expertise to other implementation initiatives, including conversion, reporting, and interface development.
- **West Virginia MMIS.** Nicole managed the development, implementation, and evaluation of quality management and risk management activities to ensure project compliance with all budget, time and quality specifications to assure client requirements across the Medicaid Enterprise. In her role, Nicole successfully project managed the on-time delivery of the NPI initiative in an accelerated time frame, successfully provided on-site support to BMS during the CMS certification evaluation; facilitated best practice cross



communication; and, met customer expectations by monitoring, evaluating and assigning corrective actions.

- **Contract Configuration and Reports Lead for West Virginia MMIS.** Nicole developed, implemented, and documented processes and standards to ensure successful completion of reports. Additionally, she analyzed business processes to transition the configuration to meet the current application. Working with the client, Nicole identified required changes and ensured issues were identified, tracked, reported and resolved in a timely manner. She was also responsible for creating a MITA Report Card and Trending Analysis Report tracking deliverables and report progress.
- **Project Management Support.** Nicole served in a project management support services role for State Medicaid initiatives including the Kentucky MMIS DDI project, which included schedule management, action item management, training support, provider development, and UAT planning. She also ensured the appropriate project organization processes were closely followed.

Presentations

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

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

**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.

- *Children with Serious Emotional Disorder 1915(c) 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.

- *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.

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



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

- *Data Improvement Project (10/2019 to present).*

Susan serves as the project manager, responsible providing oversight to the project team. She is responsible for the day-to-day activities, meeting facilitation, and monitoring progress against the agreed-upon project deliverables. Susan works closely with the client to help ensure requirements and expectations are fully met to address data quality and usability issues affecting the Medicaid program.

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

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

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

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

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

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

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

- **Project Specialist – Assistant Vice President**

- Lead Project Specialist for semi-annual Global Distribution Summits.
- Coordinated all logistics for Asset Management Distribution Group to participate in the Wachovia Championship.



- Lead Project Specialist for annual client event that hosted over 1600 Industry leaders and their families. We had ~\$1.5 trillion dollars in assets under management represented in our client base at this event.
- Partnered with Training & Development team to coordinate internal training programs (on-boarding, sales training, negotiation skills, product training) all around the U.S. and assisted with follow-up after each program to track our successes and determine where improvement was needed.
- Managed the relationship between the portfolio managers/specialists and wholesalers to coordinate communication inquiries and field travel opportunities.
- Partnered with Broker-Dealer National Sales Managers to coordinate divisional meetings and drive sales efforts.
- Managed special projects and events assigned by the President of Evergreen Investments Services Inc. (EISI) and other members of the executive leadership team.
- **Communications Coordinator/Project Manager – Officer**
 - Created quarterly newsletters and other publications that were distributed internally.
 - Coordinated the Mutual Funds, Sales and Operations (MFSO) program for wholesalers.
 - Managed the valued-add and continuing education curriculums that were available to field wholesalers.
 - Partnered with Learning and Development Managers to assist in coordination of training programs and on-boarding for new internal and external Wholesalers.

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

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



Kristan Drzewiecki, PMP

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant with BerryDunn since October, 2021
Years of Experience Relevant to Proposed Role:	15 years
Certifications and Education:	Bachelor of Science in Foreign Service, Georgetown University Master of Urban and Environmental Planning Certified Project Management Professional

Overview

Kristan is an experience consultant with more than a decade of experience in public and private health sectors, Medicaid, and the policy landscape. She has demonstrated success in managing teams and projects while maintaining business goals and innovating strategies. She has worked on various projects as a policy analyst, project manager, and business lead across various state agencies.

Experience

Nava (February 2021 to present). Kristan works as a client solutions director to generate mission-aligned growth for custom software development public benefit corporation working to make government services simple, effective, and accessible to all. She builds partnerships with state governments and leads proposal efforts to expand footprint in integrated eligibility, WIC, paid family and medical leave, and unemployment insurance technology markets. She works across disciplines (policy, product management, delivery, design, and engineering) to develop technology solutions and approaches to complex policy implementation projects.

Independent Consultant (October 2020 to present). Kristan has developed proposals and conducts research for public sector health and human services projects, such as:

- Senior Research Analyst, Food as Medicine, NYU Stern School of Business InvestNYC SDG project
- Proposal Writer, State-based Marketplace Consumer Assistance Center (Maximus)
- Subject Matter Expert, Medicaid Third-party Liability System Market Analysis

Alluma (May 2019 to October 2020). Kristan worked as executive director for business development responsible for end-to-end pipeline management for a 200-person non-profit social enterprise that removes barriers between people and public benefits through policy and technology. She crafted proposals for complex technology and policy projects including tailoring project approach, pricing strategy, and resourcing. She also prepared teams for and participated in oral interviews and demos. Kristan collaborated across functional areas to align business development strategy with product roadmaps and organizational plans, researched and analyzed market and policy landscape related to federal, state and local health and human



services (HHS) digital transformation and technology modernization, and managed partnerships with state and local government leaders to understand challenges and needs.

San Francisco Health Plan (December 2018 to April 2019). Kristan worked as a senior project manager to plan, execute, monitor, and control complex enterprise-wide projects at a non-profit Medicaid managed care plan with 180,000 covered lives. She rewrote internal purchasing and contracting procedures.

BerryDunn (November 2006 to August 2018). Kristan worked as a senior manager with the state government practice group to source and lead government health and human services policy and technology consulting projects. She launched HHS practice area, expanded into new states and sectors (early childhood and developmental disabilities) and new services (data governance planning), and managed public sector consulting projects including: IT strategic planning, business process and policy analysis, system planning and selection, independent verification and validation (IV&V). Kristan also served as a subject matter expert in Medicaid, integrated eligibility, and public benefits systems and policies, managed concurrent teams and projects, and facilitated diverse stakeholders. She developed new business and authored complex proposals.

**Hilary Foster Moles**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant (employed with BerryDunn since 04/2019)
Years of Experience Relevant to Proposed Role:	6 years
Certifications and Education:	BSN, West Virginia Institute of Technology MLC Certified Medicaid Professional (MCMP-II)

Overview

Hilary, a registered nurse, is a consultant in BerryDunn's Government Consulting Group with comprehensive clinical and state agency policy development and analysis experience. She brings expertise in case management, Medicaid eligibility and enrollment criteria, and Medicaid Management Information System (MMIS) claims processing. Hilary has supported projects in a range of roles such as subject matter expert (SME), business analyst, and project coordinator. She brings additional value to projects through her active involvement in the West Virginia Future of Nursing Action Coalition.

Relevant Experience**BerryDunn (04/2019 to present)**

Hilary serves as part of BerryDunn's Medicaid Practice Area, working with the West Virginia BMS on project management initiatives.

- **West Virginia Bureau for Medical Services (BMS)**
 - *State Plan Review and Support (SPRS) Project (09/2020 to present).*
As a business analyst, Hilary is working with the project team to analyze the West Virginia Medicaid State Plan and assist the State to make process and document improvements for long-term policy compliance and sustainability.
 - *COVID-19 Emergency Services Sub-Project (03/2020 to present).*
Hilary is supporting the project with tracking of federal waivers, WV Disaster Relief State Plan Amendments (SPAs) and other COVID-19 related legislative policy changes. Previously in the project, Hilary researched and advised the client of other state policy implementations on a daily basis. She attended weekly Centers for Medicare and Medicaid (CMS) stakeholder calls and advised the client of noteworthy changes to help them stay current with the evolving changes during the public health emergency.
 - *Payment Error Rate Measurement (PERM) Project (04/2019 to present).*
Hilary is serving as a project SME for the PERM project. She has been focusing on validating medical record errors, researching error remedies and providing



recommendations for resolution of PERM errors cited for West Virginia. Hilary also supports the Medicaid Eligibility Quality Control (MEQC) sub-project.

- o ***MMIS Contract Edit Review (04/2019 to present).***

Hilary is serving as a project SME. She has been reviewing the current BMS prior authorization requirements and conducting an analysis to help ensure the MMIS configuration and the utilization management contractor (UMC) requirements comply. Additionally, Hilary is assisting with the analysis of telehealth policies to identify opportunities and help broaden Medicaid telehealth coverage for West Virginia. She has collaborated with BMS and DXC Technology to evaluate claim edits to help ensure the MMIS setup and current processes comply with Medicaid policy and national standards.

KEPRO (09/2015 to 04/2019). As the care coordinator lead and case manager, Hilary assisted in the development of local medical policies for West Virginia Medicaid. She conducts training sessions for colleagues, providers, and physicians; provides case management to West Virginia Medicaid members; and utilizes InterQual and BMS criteria to determine medical necessity. Disciplines include hospice, home health, rehabilitation, and durable medical equipment.

West Virginia Medical Institute (02/2013 to 08/2015). As a utilization review nurse, Hilary used InterQual and BMS criteria to determine medical necessity. Disciplines included acute care, imaging, hospice, and home health.

Charleston Area Medical Center (06/2009 to 02/2013). With Charleston Area Medical Center, Hilary served as a nurse on the Labor and Delivery unit and the Surgical Intensive Care Unit, and as a level-II clinical nurse.

**Alexandra (Alex) Glówacky**

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 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.