



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: 05-02-2022

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 BMS2200000032 1	Procurement Folder:	1036166
Document Name:	Children with Serious Emotional Disorder Phase IV Project	Reason for Modification:	
Document Description:	Children with Serious Emotional Disorder Phase IV Project		
Procurement Type:	Central Delivery Order		
Buyer Name:	Crystal G Hustead		
Telephone:	(304) 558-2402		
Email:	crystal.g.hustead@wv.gov		
Shipping Method:	Best Way	Master Agreement Number:	CMA 0511 HHR2100000003 1
Free on Board:	FOB Dest, Freight Prepaid		

VENDOR	DEPARTMENT CONTACT																				
Vendor Customer Code: 000000100150 BERRY DUNN MCNEIL & PARKER LLC 2211 CONGRESS ST PORTLAND ME 04102 US Vendor Contact Phone: 6813138905 Extension: Discount Details: <table><thead><tr><th></th><th>Discount Allowed</th><th>Discount Percentage</th><th>Discount Days</th></tr></thead><tbody><tr><td>#1</td><td>No</td><td>0.0000</td><td>0</td></tr><tr><td>#2</td><td>No</td><td></td><td></td></tr><tr><td>#3</td><td>No</td><td></td><td></td></tr><tr><td>#4</td><td>No</td><td></td><td></td></tr></tbody></table>		Discount Allowed	Discount Percentage	Discount Days	#1	No	0.0000	0	#2	No			#3	No			#4	No			Requestor Name: James W Atkins Requestor Phone: (304) 352-4319 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: \$1,415,520.00

Purchasing Division's File Copy

ENTERED

CH 5/20/22

PURCHASING DIVISION AUTHORIZATION
DATE: Linda Harper 5/23/22
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION
DATE: Beverly Tolson 5-23-22
ELECTRONIC SIGNATURE ON FILE

Extended Description:

Children with Serious Emotional Disorder Waiver Initiative Phase IV Plan Project

Dates of Services 5/16/2022 - 5/15/2024

Total: \$1,415,520.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$51,600.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2022-05-16	2024-05-15				

Commodity Line Description: Lead Project Manager: Base year one**Extended Description:**

Lead Project Manager: base year one

Hourly Rate: \$215.00

Ed Daranyi 240 Hours @ \$215 = \$51,600

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$25,920.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2022-05-16	2024-05-15				

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

Engagement Manager: Base Year One

Hourly Rate: \$270.00

Nicole Becnel 96 hours @ \$270 = \$25,920

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$1,050,000.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2022-05-16	2024-05-15				

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

General Project Manager: Base Year One

Hourly Rate: \$175.00

Ethan Wiley 720 hours @ \$175 = \$126,000
Meghan Luce 2,420 hours @ \$175 = \$423,500
Brody McClellan 1,660 hours @ \$175 = \$290,500
Tonya Roloson 1,200 hours @ \$175 = \$210,000

Total 6,000 hours @ 175 = \$1,050,000

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$288,000.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-05-16	2024-05-15				

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

Extended Description:

Project Management Support Staff: Base Year One

Hourly Rate: \$80.00

Alex Glowacky 1,020 Hours @ \$80 = \$81,600
 Sam Kessler 2,100 Hours @ \$80 = \$168,000
 Bethany Pike 48 Hours @ \$80 = \$3,840
 Carole Ann Guay 48 Hours @ \$80 = \$3,840
 Emily Hendrickson 48 Hours @ \$80 = \$3,840
 Jon Williams 48 Hours @ \$80 = \$3,840
 Jordan Ramsey 48 Hours @ \$80 = \$3,840
 Karla Fossett 48 Hours @ \$80 = \$3,840
 Mary Corley 48 Hours @ \$80 = \$3,840
 Molly Hawkinson 48 Hours @ \$80 = \$3,840
 Caitlin Cabral 48 Hours @ \$80 = \$3,840
 Janine DiLorenzo 48 Hours @ \$80 = \$3,840

Total: 3,600 Hours @ \$80 = \$288,000



April 19, 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 Children with Serious Emotional Disorder (CSED) Project under our contract (CMA # HHR21*03). As stated in the SOW document, the duration of this work is estimated to be 24 months. BerryDunn agrees to a SOW start date effective May 16, 2022.

Assuming a start date of May 16, 2022, the work would then conclude on May 15, 2024. BerryDunn will honor the current pricing, terms, and conditions included in the current approved Master Agreement for the duration of this CDO.

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

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

Best Regards,

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

Eduardo G. Daranyi
Principal
207-541-2244



**Staffing Plan and Scope of Work for the
West Virginia Bureau for Medical Services
Children with Serious Emotional Disorder
Waiver Initiative: Phase 4 Project
Prepared for HHR #21*03**



Submitted by:

Nicole Becnel, PMP®, Principal
Ed Daranyi, PMP®, Principal
Berry Dunn McNeil & Parker, LLC
300 Capitol Street, Suite 1610
Charleston, WV 25301
Phone: 681-313-8905
nbecnel@berrydunn.com
edaranyi@berrydunn.com

Submitted on:

April 19, 2022

berrydunn.com



Staffing Plan and Scope of Work (SOW) for the West Virginia Bureau for Medical Services (BMS) Children with Serious Emotional Disorder Waiver (CSEDW) Initiative: Phase 4 Project

This SOW describes the tasks BerryDunn will perform to assist BMS in the fourth phase of the CSEDW project. The intent of this SOW is to help ensure a common understanding of expectations as they relate to the deliverables and services BerryDunn will provide for the CSEDW Initiative: Phase 4 Project. This SOW describes the tasks BerryDunn will perform to assist the BMS in renewing and implementing a Home and Community-Based Services (HCBS) 1915(c) Waiver for Children with a Serious Emotional Disorder (SED).

This work differs from previous phases of the initiative. Phase I work focused on creating the HCBS 1915(c) Waiver and navigating the approval process with the Centers for Medicare & Medicaid Services (CMS). Work on Phase II of the project entailed coordinating stakeholders from multiple DHHR bureaus and other State agencies, as well as Medicaid managed care organizations (MCOs), eligibility vendors, fee-for-service (FFS) and MCO providers, as well as other stakeholders. Phase III involved providing ongoing program support in multiple areas including project management, technical assistance, and data analysis to continue to help successful Waiver implementation.

Background

The CSEDW is a Medicaid HCBS Waiver program authorized under §1915(c) of the Social Security Act. The CSEDW provides services that are additions to Medicaid State Plan coverage for those enrolled in the CSEDW program, from age 3 up to the youth's 21st birthday. The CSEDW permits West Virginia (the State) to provide an array of HCBS that enable 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.

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 CSEDW Initiative: Phase 4 Project.

The objective of this project is to provide project management and subject matter expertise services to support the CSEDW project, including:

- Engagement Oversight
- Project Initiation, Execution, and Control
- Research and Technical Assistance
- Waiver Application Renewal Design and Revision



- Waiver Implementation and Process Optimization
- Project Closeout

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

- General 1.0 – Improve the State's effectiveness and efficiency
- General 4.0 – Assess, implement, and monitor compliance with all relevant federal and state laws and regulations
- General 5.0 – Help ensure program quality
- General 6.0 – Enhance and improve efficient, effective, and meaningful outreach and communication
- Care Management (CM) 1.0 – Improve healthcare outcomes for members
- Operations Management (OM) 1.0 – Improve operational efficiency and reduce costs in the healthcare system
- Performance Management (PE) 1.0 – Improve consistency of Program Management processes and effective communication of policy
- MITA Business Areas: OM, PE, Plan Management, Financial Management
- Standards and Conditions (S&C): Business Results Condition, Leverage Condition (Reuse), Industry Standards Condition

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 State BMS SharePoint site and will be brought to the attention of the BMS project sponsor.
- Deliverables will be provided in an agreed-upon format.
- The BMS leadership team will consist of Commissioner Cynthia Beane and Deputy Commissioner Sarah Young as the BMS project co-sponsors. Cynthia Parsons and Rachel Goff will act as the project leads.
- The BMS project leads will provide timely decision-making and responses to information requests from the BerryDunn project team.
- BMS intends to utilize the Medicaid Management Information System (MMIS) Implementation Advance Planning Document (IAPD) (formerly the MITA APD) for the purposes of this SOW. 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 \$1,415,520 (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 the engagement manager (EM). Ed Daranyi will serve as the Portfolio Manager, Ethan Wiley will serve as the Program Manager, and Meghan Luce will serve as the Project Manager.
- This work will begin upon approval of this SOW and a mutually agreed-upon date, and is projected to continue for 24 months.



2.0 Project Scope and Staffing Plan

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

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

Ref #	Project Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
1.0	<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 01 (D01): Commissioner Briefing <p><i>Completion Criteria</i></p> <p>Engagement Oversight will be deemed complete upon signature acceptance of D06: Project Closeout Summary by the BMS project sponsor(s) or their designee.</p>	Nicole Becnel Ed Daranyi Ethan Wiley	680
2.0	<p>Project Initiation, Execution, and Control</p> <p><i>Service Approach</i></p> <p>In support of Project Initiation, 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 Initiation, Execution, and Control will also include:</p> <ul style="list-style-type: none">Facilitating meetings, preparing meeting	Ethan Wiley Meghan Luce Brody McClellan Tonya Roloson Sam Kessler Alex Glowacky Bethany Pike Carole Ann Guay Emily Hendrickson	910



Ref #	Project Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>materials, and taking notes for BerryDunn- and State-owned meetings</p> <ul style="list-style-type: none">Preparing monthly project status updates, risks, issues, and briefings for the State leadership teamManaging project logs (action item, decision, issue, and risk tracking)Storing project documentation repository in an agreed-upon SharePoint locationConducting stakeholder workgroups with the State and its vendors <p><i>Artifact(s) and Deliverable(s)</i></p> <ul style="list-style-type: none">D02: Project TimelineD03: Monthly Status ReportD04: Action item, risk, issue, and decision logsArtifact 01 (A01): Meeting agendas, materials, and notes <p><i>Completion Criteria</i></p> <p>Project Initiation, Execution, and Control will be deemed complete upon signature acceptance of D06: Project Closeout Summary by the BMS project sponsor(s) or their designee.</p>	<p>Jon Williams Jordan Ramsey Karla Fossett Mary Corley Molly Hawkinson Caitlin Cabral Janine DiLorenzo</p>	
3.0	<p>Research and Technical Assistance</p> <p><i>Service Approach</i></p> <p>BerryDunn will assist the State with assessing potential SPAs and technical assistance inclusive of the following:</p> <ul style="list-style-type: none">Research summaries and briefs on State Plan and Waiver opportunities from CMSImpact assessments on the effect of proposed policyAdditional ad hoc requests related to support for the Waiver as neededTechnical assistance for the Waiver and State Plan determined by the BMS Project Lead <p><i>Artifact(s) and Deliverable(s)</i></p> <ul style="list-style-type: none">A02: Research materials	<p>Ethan Wiley Meghan Luce Brody McClellan Tonya Roloson Sam Kessler Alex Glowacky Bethany Pike Carole Ann Guay Emily Hendrickson Jon Williams Jordan Ramsey Karla Fossett Mary Corley Molly Hawkinson Caitlin Cabral</p>	1,760



Ref #	Project Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none"> A03: Strategy documents <p>Completion Criteria Research and Technical Assistance will be deemed complete upon signature acceptance of D06: Project Closeout Summary by the BMS project sponsor(s) or their designee.</p>	Janine DiLorenzo	
4.0	<p>Waiver Design, Revision, and Renewal</p> <p>Service Approach BerryDunn will assist the State with developing a renewal application for the CSEDW inclusive of the following:</p> <ul style="list-style-type: none"> Draft Waiver documents Draft Waiver packages for submission to CMS Support for BMS in negotiations and calls with CMS Support in addressing informal and formal comments from CMS, stakeholders, and other State agencies <p>Artifact(s) and Deliverable(s)</p> <ul style="list-style-type: none"> D05: Waiver Renewal Application A04: Materials to support CMS calls A05: Formal and informal comments <p>Completion Criteria Waiver Design, Revision, and Renewal will be deemed complete upon signature acceptance of D06: Project Closeout Summary by the BMS project sponsor(s) or their designee.</p>	<p>Ethan Wiley Meghan Luce Brody McClellan Tonya Roloson Sam Kessler Alex Glowacky Bethany Pike Carole Ann Guay Emily Hendrickson Jon Williams Jordan Ramsey Karla Fossett Mary Corley Molly Hawkinson Caitlin Cabral Janine DiLorenzo</p>	2,890
5.0	<p>Waiver Implementation and Process Optimization</p> <p>Service Approach BerryDunn will assist the State in implementing the approved Waiver and revising materials developed during previous project phases.</p> <ul style="list-style-type: none"> A06: Transition materials <p>Completion Criteria State Plan Process Optimization and Training will be deemed complete upon signature acceptance of D06: Project Closeout Summary by the BMS project sponsor(s) or their designee.</p>	<p>Ethan Wiley Meghan Luce Sam Kessler Alex Glowacky Bethany Pike Carole Ann Guay Emily Hendrickson Jon Williams Jordan Ramsey Karla Fossett</p>	3,466



Ref #	Project Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
		Mary Corley Molly Hawkinson Caitlin Cabral Janine DiLorenzo	
6.0	<p>Project Closeout</p> <p>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 Project Closeout Summary will document the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none">• D06: Project Closeout Summary <p><i>Completion Criteria</i></p> <p>BerryDunn services will be considered complete when the project sponsor(s) or their designee(s) formally accepts and signs D06: Project Closeout Summary.</p>	Nicole Becnel Ed Daranyi Ethan Wiley Meghan Luce Sam Kessler Alex Glowacky	230
Total Hours			9,936
Total Not-to-Exceed Cost Estimate			\$1,415,520



3.0 Project Resources and Hours

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

Table 2: Project Resources

CL Year 1	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
2	EM	\$270	Nicole Becnel	96	\$25,920
1	LPM	\$215	Ed Daranyi	240	\$51,600
4	GPM	\$175	Ethan Wiley	720	\$126,000
4	GPM	\$175	Meghan Luce	2,420	\$423,500
4	GPM	\$175	Brody McClellan	1,660	\$290,500
4	GPM	\$175	Tonya Roloson	1,200	\$210,000
5	SS	\$80	Alex Glowacky	1,020	\$ 81,600
5	SS	\$80	Sam Kessler	2,100	\$168,000
5	SS	\$80	Bethany Pike	48	\$3,840
5	SS	\$80	Carole Ann Guay	48	\$3,840
5	SS	\$80	Emily Hendrickson	48	\$3,840
5	SS	\$80	Jon Williams	48	\$3,840
5	SS	\$80	Jordan Ramsey	48	\$3,840
5	SS	\$80	Karla Fossett	48	\$3,840
5	SS	\$80	Mary Corley	48	\$3,840
5	SS	\$80	Molly Hawkinson	48	\$3,840
5	SS	\$80	Caitlin Cabral	48	\$3,840
5	SS	\$80	Janine DiLorenzo	48	\$3,840
			Total Hours:	9,936	\$1,415,520



4.0 Project Hours and Costs Per Month

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

Table 3: Project Costs by Month

Month #	EM Hours	LPM Hours	GPM Hours	SS Hours	Estimated Hours Per Month	Estimated Cost Per Month
Month 1	4	10	240	150	404	\$ 57,230
Month 2	4	10	240	150	404	\$ 57,230
Month 3	4	10	240	150	404	\$ 57,230
Month 4	4	10	240	150	404	\$ 57,230
Month 5	4	10	240	150	404	\$ 57,230
Month 6	4	10	240	150	404	\$ 57,230
Month 7	4	10	240	150	404	\$ 57,230
Month 8	4	10	240	150	404	\$ 57,230
Month 9	4	10	260	150	424	\$ 60,730
Month 10	4	10	260	150	424	\$ 60,730
Month 11	4	10	260	150	424	\$ 60,730
Month 12	4	10	260	150	424	\$ 60,730
Month 13	4	10	260	150	424	\$ 60,730
Month 14	4	10	260	150	424	\$ 60,730
Month 15	4	10	260	150	424	\$ 60,730
Month 16	4	10	260	150	424	\$ 60,730
Month 17	4	10	260	150	424	\$ 60,730
Month 18	4	10	260	150	424	\$ 60,730
Month 19	4	10	260	150	424	\$ 60,730
Month 20	4	10	260	150	424	\$ 60,730
Month 21	4	10	240	150	404	\$ 57,230
Month 22	4	10	240	150	404	\$ 57,230
Month 23	4	10	240	150	404	\$ 57,230
Month 24	4	10	240	150	404	\$ 57,230
Total	96	240	6,000	3,600	9,936	\$ 1,415,520



5.0 High-Level Timeline

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

Figure 1: Proposed High-Level Timeline

Task	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
1.0 Engagement Oversight																								
2.0 Project Initiation, Execution, and Control																								
3.0 Research and Technical Assistance																								
4.0 Waiver Design, Revision, and Renewal																								
5.0 Waiver Implementation and Process Optimization																								
6.0 Project Closeout																								



BerryDunn Authorized Signature

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

April 19, 2022

Signature

Date

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

Cynthia Parsons, MA, Director

Digitally signed by: Cynthia Parsons, MA, Director
DN: CN = Cynthia Parsons, MA, Director email = cynthia.a.
parsons@wv.gov C = US O = WV DHHR OU = Medical Services
Date: 2022.04.25 11:33:43 -05'00'

04/25/2022

Signature

Date



Appendix A: Resumes

Nicole Becnel, PMP®

Proposed Project Role:	Engagement Manager
Role at BerryDunn:	Employed with BerryDunn since 06/2010
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	BA, Speech and Hearing Science, University of South Florida Certified Project Management Professional Executive Coaching Certification®

Overview

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

Relevant Experience

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

- **West Virginia Department of Health and Human Resources (DHHR) Bureau for Medical Services (BMS).**
 - *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (07/2020 to present)*

Nicole is the Lead Project Manager for the EDQ Assistance Project to support initiatives to optimize MCO encounter data processes for BMS's risk-based managed care programs. Nicole leads the project team that is assisting the State with the retirement of a historical file submission process between the MCOs and the Data Warehouse/Decision Support Solution (DW/DSS) vendor and implementing a fully compliant 837 encounter data process with the State's fiscal agent and Medicaid Management Information System (MMIS) vendor. BerryDunn provides ongoing project management support; diagnoses and assesses necessary modifications to the MMIS as it relates to encounter data; supports the development, deployment, and implementation of applicable MMIS edits and enhancements to support compliance encounter data processes; and supports, monitors, and troubleshoots MCO testing and deployment of 837 files.
 - *Electronic Visit Verification (EVV) Solution Implementation Project (03/2018 to*



present).

Nicole leads the project team implementing the overall EVV solution, which includes strategic planning, organizational change management, requirement development, RFP draft narratives and supporting documentation, certification planning and assistance, APD development and updates, evaluation and scoring support/facilitation, vendor onboarding, vendor deliverable review, and UAT planning and support.

- *Integrated Eligibility Solution (IES)/People's Access to Help (PATH) Procurement Support and DDI Project Management (10/2015 to present).*
Nicole is the Lead Project Manager for West Virginia's largest information technology transformation project, the Medicaid enterprise IES, known as People's Access To Help (PATH). PATH supports the eligibility, enrollment, and administration of the DHHR's human services programs, including Medicaid, Children's Health Insurance Program (CHIP), Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. Nicole provides executive leadership working with the internal team, the State, and all vendors. She reviews, coordinates, and oversees statements of work (SOWs), deliverables, and risk and issue management.
- *APD Assistance (07/2010 to present)*
Nicole is the Lead Project Manager overseeing the development and approval of Advance Planning Documents (APDs) to help the State obtain federal funding for Medicaid Enterprise System modernization initiatives such as the Medicaid performance management and quality assurance, third-party liability (TPL) planning, adding CHIP data to the Medicaid data warehouse, Payment Error Rate Measurement (PERM), and the PATH implementation. Nicole's guidance within the APD process has helped West Virginia secure and maintain millions of dollars in federal funding.
- *COVID-19 Contact Tracing and Testing Initiative (04/2020 to 09/2020).*
Nicole led the team that assisted the State with the response to the COVID-19 public health emergency. She supported the DHHR Commissioners and the Secretary to help ensure the State had the support they needed to address COVID-19 and the response to its aftermath. She oversaw the procurement and implementation of a contact-tracing and disease investigation software system, the procurement of federal funding for epidemiological activities and testing, and staffing and organizational development activities for DHHR and BPH. The software helped the State coordinate its contact tracing initiatives and use of the contact tracing platform across a workforce of DHHR volunteers, the National Guard, West Virginia University staff, and State local health departments. The outcome of the project was the successful statewide launch of the new contact-tracing and disease investigation software and the procurement of \$37 million in federal relief funding for public health initiatives related to COVID-19.
- *Mountain Health Promise (MHP) Implementation Project Management Support*



(03/2020 to 06/2020)

Nicole was the Lead Project Manager overseeing the team, assisting the State help ensure a successful implementation and smooth operational transition of the MHP program. The program was administered by a specialized MCO serving children in the child welfare populations, including foster care (FC), adoption assistance (AA), as well as those enrolled in the Children with Serious Emotional Disorder (CSED) 1915(c) waiver.

- *West Virginia Children's Health Insurance Program (WVCHIP) Operational Readiness Review (12/2019 to 10/2020)*

Nicole was the Lead Project Manager overseeing the State's transition of the WVCHIP program from fee for service to managed care to provide seamless care between the two programs and offer greater efficiency and innovation opportunities. The team performed desktop audits of policies and procedures and on-site systems demonstrations of three MCOs selected to provide services to WVCHIP members. The team developed a framework and approach to performing the review; developed a comprehensive readiness assessment tool; facilitated ORR entrance conferences with the MCOs; and performed an evaluation of more than 1,000 MCO policies and procedures to complete the desk-level assessment for the WVCHIP transition to managed care. The team developed unique and tailored findings reports for each MCO and will prepare an Ongoing Performance Monitoring Transition Plan and facilitate a Virtual MCO Systems Review to assist WVCHIP in assessing MCO readiness.

- *Mountain Health Trust (MHT) MCO Procurement Assistance Phase I and Phase II Projects (07/2019 to 09/2020)*

Nicole was the Lead Project Manager overseeing BerryDunn's procurement assistance and project management support for managed care and readiness review services for the MHT program, the State's risk-based managed care program. The team assisted in population expansion under the current comprehensive MCO contract to add the Children's Health Insurance Program (CHIP) to the program. BerryDunn assisted the State with developing a Request for Proposal (RFP) to procure vendors to administer Medicaid and CHIP services on behalf of the State through the MHT. The competitive re-procurement of the MHT program was valued at over \$5 billion and promoted the increased quality of care, health outcomes, and data quality and efficiency for the State's managed care populations.

- *Provider Management Support (7/2019 to 1/2021)*

Nicole served as the Lead Project Manager assisting West Virginia with their leverage and reuse initiatives demonstrating the Leverage Condition established by CMS in the MTA Seven Standards and Conditions. The team also supported West Virginia Medicaid leadership to execute a multi-state collaborative where states can collaborate, share information, and brainstorm solutions. Nicole led the project team that has supported West Virginia with this initiative. Since its inception, West Virginia has increased membership to 12 state partners that



participate monthly.

- ***Substance Use Disorder (SUD) Waiver Initiative Project (07/2016 to 6/2017).***
Nicole was the Lead MMIS Project Manager overseeing the SUD waiver initiative "Creating a Continuum of Care for Medicaid Enrollees with Substance Use Disorders" Section 1115 waiver demonstration. The waiver allows the State to strengthen its SUD delivery system to improve the care and health outcomes for State beneficiaries with SUD through expanded SUD service coverage and new programs to improve the quality of care. The team provides annual and quarterly reporting to CMS and financial reporting requirements for budget-neutrality, future technology procurements to support the five-year demonstration, and MCO contract requirements specific to the SUD demonstration.
- ***Medicaid Information Technology Architecture (MITA) 3.0 State Self-Assessment (SS-A) Maintenance and Annual Update Assistance Project (8/2015 to 01/2020)***
Nicole was the Lead Project Manager for BMS's MITA SS-A efforts, including the annual maintenance of SS-A activities and Data Management Strategy (DMS). She leads the organization development planning to support WV's MITA maturity and modernization efforts. The team is creating a roadmap and schedule to help the State assess areas for improvement and change specific to departmental and bureau(s) structure, operational improvements, talent development, and training. Organization development for the project will take the MITA SSA findings and focus on the DHHR goals and objectives for its MMIS, the technical architecture assessment of the State's Medicaid modules' maturity levels, and business area assessments of the State's Medicaid system modules. These activities clarify BMS's short-term and long-term strategic goals and help BMS request enhanced federal funding to achieve those goals.
- ***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.

- Additionally, Nicole has served in the role of project manager, lead MMIS manager or lead project manager under the current West Virginia contract and past contracts for the following projects:
 - *Managed Care Organization (MCO) Operational Readiness Review (ORR) Assistance (09/2020 to 12/2020)*
 - *Medicaid Management Information System (MMIS) Fee Schedule and Edit Quality Review Project: Phase III (06/2020 to 11/2020)*
 - *Mountain Health Trust (MHT) Managed Care Organization (MCO) Procurement Assistance Project: Phase II (05/2020 to 09/2020)*
 - *Substance Use Disorder (SUD) Waiver Initiative Phase 4 (04/2020 to 05/2021)*
 - *Mountain Health Promise (MHP) Implementation (Coordinated Care Management) (03/2020 to 06/2020)*
 - *Managed Care Organization Transition: Phase II (03/2020 to 02/2021)*
 - *State Plan Review and Support (SPRS) (02/2020 to 05/2021)*
 - *Technical Assistance and Program Support (TAPS): Phase 2 (11/2019 to 04/2021)*
 - *Children with Serious Emotional Disorder Waiver (CSEDW) Initiative: Phase II (10/2019 to 05/2020)*
 - *West Virginia Children's Health Insurance Program (WVCHIP) MCO Transition Planning (01/2019 to 07/2019)*
 - *Substance Use Disorder (SUD) Waiver Initiative: Phase III (03/2019 to 03/2020)*
 - *Medicaid Management Information System (MMIS) Payment Error Rate Measurement (PERM) Phase II (05/2020 to 05/2021)*
 - *Coordinated Care Management Transition Project Management and Procurement Assistance (02/2019 to 01/2020)*
 - *Medicaid Management Information System (MMIS) Fee Schedule and Edit Quality Review Phase II (01/2019 to 04/2020)*
 - *Enterprise Program Management Office (EPMO) (11/2018 to 10/2020)*
 - *Technical Assistance and Program Support (TAPS) (11/2018 to 10/2019)*



- *Electronic Visit Verification Solution Implementation (06/2018 to 12/2019)*
- *Provider Enrollment (PEA) Year 2 (05/2018 to 05/2019)*
- *Contract Edit Fee Schedule Review (09/2017 to 09/2018)*
- *Innovation Accelerator Program (IAP) Data Analytic Technical Support (09/2017 to 08/2018)*
- *Medicaid Information Technology Architecture (MITA) State Self-Assessment (SS-A) Maintenance and Annual Update Assistance (09/2017 to 08/2018)*
- *Data Visioning and Warehouse Request for Proposal (RFP) Development and Procurement Assistance (09/2017 to 08/2019)*
- *Technical and Information Enterprise Project Management Services (TEPMS) (05/2017 to 07/2018)*
- *Access to Care Project Monitoring Phase (03/2017 to 04/2021)*
- *Provider Re-enrollment (PEA) (03/2017 to 02/2018)*
- *R-MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 07/2017)*
- *Gap Analysis and Project Management Services (GAPMS) (10/2016 to 06/2018)*
- *Income Maintenance Manual (IMM) Update (09/2016 to 09/2017)*
- *Access to Care Project (Access Monitoring Plan Phase) (04/2016 to 10/2016)*
- *Updates to West Virginia Health Information Technology (HIT) Plans and HIT and Health Information Exchange (HIE) Advance Planning Document (APD) Assistance (03/2016 to 04/2017)*
- *RAPIDS Transition Facilitation (02/2016 to 05/2016)*
- *Medicaid Eligibility and Enrollment Request for Proposal (RFP) Development and Procurement Assistance (10/2015-12/2017)*
- *ICD-10 Readiness Assessment, Implementation and Migration (09/2013 to 03/2016)*
- *Medicaid Information Technology Architecture (MITA) State Self-Assessment (SS-A) Maintenance and Annual Update Assistance (08/2015 to 08/2017)*
- *MMIS Design, Development, and Implementation (DDI) and Certification (07/2015 to 12/2016)*
- *Medicaid Eligibility and Enrollment APD (06/2015 to 09/2015)*
- *PPACA Workgroup Oversight (2012 to 2015)*
- *5010 System Refresh (2012 to 2015)*
- *HIT Statewide Strategic Plan development (2012 to 2014)*
- *Provider Enrollment (2012 to 2015)*
- *MITA 3.0 Organizational Redesign (2013)*
- *Policy Workflow Assessment (2013)*
- **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, employed with BerryDunn since September 2005
Years of Experience Relevant to Proposed Role:	20 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.

- **West Virginia Bureau for Medical Services (BMS) (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. Since Ed joined the West Virginia project on a full time basis in 2012, he has held many roles including Engagement Manager, Lead Project Manager and General Project Manager. In 2012, took responsibility for stabilizing and growing the local Charleston office to now employ over 25 local staff. Ed has overseen over 100 projects for West Virginia. Several are described and listed below.
 - *West Virginia Children's Health Insurance Program (WVCHIP) Operational*



Readiness Review (2019 to present).

Ed is the Engagement Manager overseeing the State's transition of the WVCHIP program from fee for service to managed care to provide more seamless care between the two programs and offer greater efficiency and opportunities for innovation. The team performs desktop audits of policies and procedures and on-site systems demonstrations of three MCOs selected to provide services to WVCHIP members. The team developed a framework and approach to performing the review; developed a comprehensive readiness assessment tool; facilitated ORR entrance conferences with the MCOs; and performed an evaluation of more than 1,000 MCO policies and procedures to complete the desk-level assessment for the WVCHIP transition to managed care. The team developed unique and tailored findings reports for each of the MCOs and will prepare an Ongoing Performance Monitoring Transition Plan and facilitate a Virtual MCO Systems Review to assist WVCHIP in assessing MCO readiness.

○ ***WVCHIP MCO Transition Planning Project Phases I and II (03/2019 to present).***

Ed provides Engagement Management oversight to help the State transition members from an FFS model to managed care. BerryDunn provides project management and support services; systems transition and readiness planning; facilitation of MCO, MMIS, and Enrollment Broker (EB) file testing; facilitation of weekly Out-of-Pocket (OOP) Maximum workgroup discussions with the fiscal agent, MCOs, WVCHIP, and other key stakeholders and development of the WVCHIP managed care contract. BerryDunn supports technical implementation activities for WVCHIP in advance of the January 1, 2021, go-live date.

○ ***People's Access to Help (PATH) DDI Project Management (10/2017 to present).***

Ed, alongside other principals engaged in work for the State, provides strategic direction and oversight to the project team implementing the largest information technology transformation project that West Virginia has ever undertaken, the Medicaid enterprise IES, known as People's Access To Help (PATH). PATH supports the eligibility, enrollment, and administration of the DHHR's human services programs, including Medicaid, Children's Health Insurance Program (CHIP), Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. Ed provides executive leadership working with the internal team, the State, and all vendors, ensuring that all project deliverables are met and risks and issues are appropriately escalated and addressed.

○ ***Substance Use Disorder (SUD) Waiver Initiative Project (02/2016 to present).***

As Engagement Manager, Ed with the BerryDunn team of specialists, developed and successfully negotiated a Section 1115 Waiver Demonstration Project to undertake SUD delivery system transformation efforts in West Virginia. The SUD waiver strengthened the State's SUD delivery system to improve the care and



health outcomes for State beneficiaries with SUD through expanded SUD service coverage and the introduction of new programs to improve the quality of care. The team provides annual and quarterly reporting to CMS and financial reporting requirements for budget-neutrality, future technology procurements to support the five-year demonstration, and MCO contract requirements specific to the SUD demonstration. 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.

- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (2012 to present).*

Ed has been the Engagement Manager overseeing several of the State's MITA State Self-Assessments (2.0 and 3.0) and road map over the past eight years. Ed helped the State develop their Medicaid modernization strategy and determine the path of their future system direction and investments. He worked to understand their priorities and help ensure prioritization and resources were aligned. The team is currently creating a roadmap and schedule to help the State assess areas for improvement and change specific to departmental and bureau(s) structure, operational improvements, talent development, and training. Organization development for the project will take the findings of the MITA SSA and focus on DHHR goals and objectives for its MMIS, the technical architecture assessment of the maturity levels of the State's Medicaid modules, and business area assessments of the State's Medicaid system modules. These activities clarify BMS' short-term and long-term strategic goals and help BMS request enhanced federal funding to achieve those goals.

- *Data Visioning and Warehouse Development and Procurement Assistance (2012 to present).*

Over the past eight years Ed has served as the Engagement Manager, the State has engaged in two major data warehouse procurements and implementations. Ed has formed teams to assist with data visioning activities, facilitate the integration of data sources with the Data Warehouse/Decision Support System (DW/DSS), develop two Request for Proposals (RFP), and provide procurement support for a new DW/DSS. The team identified, consolidated, and subsequently retired duplicative DHHR databases and systems. In the current procurement effort, the team developed a charter and mission with the State, collaborating with stakeholders, developing standardized project artifacts, and developing an overlap map. After completing this Enterprise Data Integration and Consolidation Initiative, the team is now focused on assisting DHHR in the development of a Medicaid Enterprise DW RFP, as well as the subsequent evaluation and award of a solution to support the data warehousing, analytics, and reporting needs of DHHR.

- *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.

- Additionally, Ed has overseen the following projects as the WV Engagement Manager under the current contract and past contracts:
 - *Payment Error Rate Measurement (PERM) Project: Phase II (05/2020 to 05/2021)*
 - *State Plan Review and Support (SPRS) Project (02/2020 to 05/2021)*
 - *Substance Use Disorder (SUD) Waiver Initiative Project (03/2019 to 05/2021)*
 - *Technical Assistance and Program Support (TAPS) Project (11/2018 to 04/2021)*
 - *Project Management and Support Services for the Access to Care Project Monitoring Phase (04/2016 to 10/2016; 03/2017 to 04/2021)*
 - *Managed Care Organization Transition: Phase II (03/2020 to 02/2021)*
 - *WVCHIP MCO Operational Readiness Review Assistance (09/2020 to 12/2020)*
 - *MMIS Fee Schedule and Edit Quality Review (09/2017 to 09/2018; 01/2019 to 04/2020; 06/2020 to 11/2020)*
 - *Enterprise Program Management Office (EPMO) (11/2018 to 10/2020)*
 - *Lead project manager until 6/30/2019; principal in charge as of 7/1/2019*
 - *Mountain Health Trust (MHT) MCO Procurement Assistance Project: Phase II (05/2020 to 09/2020)*
 - *Mountain Health Promise (MHP) Implementation Project Management Support (03/2020 to 06/2020)*
 - *Children with Serious Emotional Disorder 1915(c) HCBS Waiver (CSEDW): Phase II (10/2019 to 05/2020)*
 - *Coordinated Care Management Project Management and Procurement Assistance Project (02/2019 to 01/2020)*
 - *Electronic Visit Verification (EVV) Solution Implementation Project (06/2018 to 12/2019)*
 - *Lead project manager until 6/30/2019; principal in charge as of 7/1/2019*
 - *Medicaid Enterprise Integrated Eligibility (EIE) Solution (10/2017 to 09/2019)*
 - *Data Visioning and Warehouse Development and Procurement Assistance*



Project (09/2017 to 08/2019)

- *WVCHIP MCO Transition Planning Project (01/2019 to 07/2019)*
- *Provider Enrollment (PEA) Project (2012 to 2015; 03/2017 to 02/2018; 05/2018 to 05/2019)*
- *WVCHIP Data Warehouse / Decision Support System (DW/DSS) Historical Data Testing and Implementation (2012 to 2015; 10/2017 to 04/2019)*
- *Third Party Liability Options Analysis and Procurement Assistance Project (08/2018 to 11/2018)*
- *Innovation Accelerator Program (IAP) Data Analytic Technical Support (09/2017 to 08/2018)*
- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (08/2015 to 08/2018)*
- *Technical and Information Enterprise Project Management Services (TEPMS) Project (05/2017 to 07/2018)*
- *Gap Analysis and Project Management Services (GAPMS) (10/2016 to 06/2018)*
- *Asset Verification System (AVS) Project Management Services and Procurement Assistance (04/2017 to 01/2018)*
- *West Virginia/New Jersey MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 01/2018)*
- *Eligibility and Enrollment RFP Development Assistance (10/2015 to 12/2017)*
- *Income Maintenance Manual Update Project (09/2016 to 09/2017)*
- *Updates to West Virginia Health IT (HIT) Plans and HIT and Health Information Exchange (HIE) APD Assistance (03/2016 to 04/2017)*
- *Project Management of MMIS Procurement, DDI, and Certification (07/2015 to 12/2016)*
- *Safe at Home Advance Planning Document (APD) Update (08/2015 to 11/2016)*
- *RAPIDS (Eligibility System) Transition Facilitation Project (02/2016 to 05/2016)*
- *ICD-10 Transition Planning and Implementation (09/2013 to 03/2016)*
- *Eligibility and Enrollment APD (06/2015 to 09/2015)*
- *PPACA Workgroup Oversight (2012 to 2015)*
- *5010 Refresh Project (2012 to 2015)*
- *State Medicaid Health IT Planning and Health Care Reform Consulting (2012 to 2014)*
- *Non-Emergency Medical Transportation (NEMT) RFP Development (2012 to*



2013)

- *MITA 3.0 Organizational Redesign (2013)*
- *Policy Workflow Assessment (2013)*
- *Prior Authorization Forms Revisions (2013)*
- *ePrescribing Helpdesk and Support (2012)*

- **West Virginia Department of Health and Human Resources (DHHR) (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.

Martin's Point Health Care (2005 to 2007). Ed led a project management effort for Martin's Point Project Management for Health Insurance Portability and Accountability Act (HIPAA) Compliance initiative. He performed an organizational assessment and worked with executive leadership to develop a



governance model, which then in turn directed the development of policies and procedures aimed at keeping the organization in compliance with the HIPAA Rule. Ed facilitated meetings with departments across the organization to create the policies and procedures, presented them to the HIPAA oversight board for approval, and then assisted with the training and implementation of the new procedures.

Goold Health Systems (1999 to 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.

- **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 (1985 to 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

Project Management/Testing, Presentation for NESCSO workshop (2017)

Moderator, MESC Conference sessions (2015-2019)

People and processes: Planning health and human services IT systems modernization to improve outcomes, 11/23/2020 Blog

Published Insights on www.berrydunn.com include but are not limited to: NAMD 2020 reflections: Together towards the future and MESC 2020: Where we are today and where we will be tomorrow.

**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:	8 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 remediates 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.

**Meghan Luce**

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant with BerryDunn since September 2021
Years of Experience Relevant to Proposed Role:	6 years
Certifications and Education:	Bachelor of Science in Public Health, State University of New York at Albany

Overview

Meghan is a dedicated health and human services professional, experienced in the assessment, evaluation, and implementation of health programs for individuals with physical and mental health diagnoses. She has focused experience with the development of service standards, regulations, and policies, and is highly skilled in data collection and analysis.

Experience**BerryDunn (October 2021 to present).**

Meghan is a senior consultant with BerryDunn's Medicaid practice group.

- **West Virginia Bureau for Medical Services (BMS).**
 - *Children with Serious Emotional Disorder 1915(c) HCBS Waiver (CSEDW) (10/2021 to present).*

As project manager, Meghan 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.

New York State Technology Enterprise Corporation (October 2020 to present). Meghan worked as a consultant and business analyst to collaborate with team members and conceptualize, deliver, and support clients through today's ever-changing healthcare landscape. She supported healthcare technology initiatives through applying strong business analysis, critical thinking and problem-solving skills. Her primary project was monitoring New York State's implementation of Electronic Visit Verification (EVV) to comply federally with the Cures Act and avoid FMAP reductions. The scope of work involved program and policy development, responding to internal and external stakeholder inquiries, compliance development and program monitoring. She reviewed Federal Regulations to ensure New York State complies and is aware of federal requirements. Meghan also researched other states to monitor how they are



implementing EVV systems, developed training standards and training material for NYS EVV program, and monitored NYS compliance with 21st Century Cures Act.

New York Department of Health (October 2018 to October 2020). Meghan worked as a senior healthcare program specialist responsible for the oversight and monitoring of contracted New York State Health Homes and designated Home and Community Based providers to ensure compliance with Federal and State regulations and guidelines. She provided oversight and guidance to 1915(c) Waiver transition providers during the consolidation to the Children's Waiver, including the transition of enrolled Waiver children. Identify and correct Restriction Exception codes for the Health Home Serving Children, Children's Waiver and members transitioning to the Office of People with Developmental Disabilities Comprehensive Waiver. She contributed to the development Health Home Serving Children and Home and Community Based Service policy, guidance and training material, reviewed policy and procedures developed by Health Homes for compliance to New York State and Federal guidelines, and attended on site audits of Health Home across New York State.

Transitional Services Association, Inc. (February 2017 to October 2018). Meghan worked as a program supervisor with the Adult and Youth Care Management team of seventeen care managers. She represented the agency at meetings and events, coordinated activities and ensured compliance with the policies of three separate Health Homes under the New York State Department of Health, and verified all program referrals and Medicaid eligibility. She reviewed documentation for appropriateness to meet chronic condition or behavioral health criteria, and provided support for identified clients through the outreach process, assist Care Managers when needed regarding enrolled clients. Meghan performed ongoing, internal audits of Medicaid billing systems and program statistics, developed policy and procedure documents in cooperation with the quality assurance committee, and innovated training and in-services for newly hired staff and to improve service delivery. She also managed program budgets and client support funds. She redesigned program documentation for youth and adult non-Medicaid programs for a more uniform system and assisted with state and federal audits of Medicaid Health Home client charts. Additionally, she conducted intake appointments with new clients, review referrals, Medicaid eligibility, and complete appropriate assessments, including intake assessment, comprehensive, crisis plans, and CANS.

Joseph's House & Shelter (December 2015 to February 2017). Meghan worked as a supported housing advocate to assist individuals living with a disabling behavioral health diagnosis, cognitive disabilities, substance abuse disorders, or medical conditions. Coordinated with social and medical service providers to identify and ensure stable housing options. Provide on-call services every eight weeks to two supported housing programs with 60 residents. Meghan coordinated home and community-based services for Medicaid eligible individuals with disabilities and assisted individuals with the annual housing recertification process and obtain all necessary documents for HUD.

**Brody J. McClellan, MPA**

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

Overview

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

Experience**BerryDunn (09/2021 to present)**

Brody is a senior consultant with BerryDunn's Medicaid practice group.

- **West Virginia Bureau for Medical Services (BMS).**
 - *American Rescue Plan Act (ARPA) Section 9813 Mobile Crisis Grant Project (10/2021 to present).*
As project manager, Brody plans and executes the design, negotiation and implementation of a Medicaid Mobile Crisis Grant program. The Mobile Crisis Grant provides services that are additions to Medicaid State Plan coverage for Mobile Crisis Services.
 - *Mountain Health Promise (MHP) Procurement Project (10/2021 to present)*
As subject matter expert, Tonya assists in the development of a Request for Proposal (RFP), designed to aid the State through a procurement, to help transition West Virginia's children in foster care, adoption assistance, and/or the CSEDW into a single specialized managed care organization (MCO). The MCO will provide enhanced care coordination for physical, behavioral, and social services.



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

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

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

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



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

**Tonya Roloson**

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

Overview

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

Experience**BerryDunn (09/2021 to present)**

Tonya is a senior consultant with BerryDunn's Medicaid practice group.

- **West Virginia Bureau for Medical Services (BMS).**
 - *American Rescue Plan Act (ARPA) Section 9813 Mobile Crisis Grant Project (10/2021 to present).*

As subject matter expert, Tonya plans and drafts the design, negotiation strategy and implementation plan of a Medicaid Mobile Crisis Grant program. The Mobile Crisis Grant provides services that are additions to Medicaid State Plan coverage for Mobile Crisis Services.
 - *Mountain Health Promise (MHP) Procurement Project (10/2021 to present)*

As subject matter expert, Tonya assists in the development of a Request for Proposal (RFP), designed to aid the State through a procurement, to help transition West Virginia's children in foster care, adoption assistance, and/or the CSEDW into a single specialized managed care organization (MCO). The MCO will provide enhanced care coordination for physical, behavioral, and social services.



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

St. Catherine's Center for Children (May 2014 to November 2016). Tonya worked as the director of training and staff development to maintain electronic records of staff performance son training compliance, facilitate agency training for employees (including medication management, documentation, crisis intervention, safety in the workplace, motivational interviewing, youth police initiative and youth mental health first aid), and reviewed policy, procedure, and compliance records across all agency programs. She maintained and created platforms for staff to attend and receive training while maintaining training documents and materials. Tonya monitored Medicaid and HIPAA compliance and reviewed policies as needed. She collaborated with the QA Team to ensure quality metrics were met and regularly attended Medicaid trainings to keep the teams and strategies were up to date. She reviewed case file notes, Medicaid eligibility, and monitored Medication Management compliance.

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

"Choices Enhanced" Catholic Charities (August 2008 to September 2010). Tonya worked as the project director partnered with Syracuse University to create new policy, review policy of each contract partner and ensure all policy is consistent with program deliverables. She ensured program fidelity, quality assurance, and data collection procedures were strictly adhered to and



wrote the RFP that was approved by health and human services, to address teen pregnancy. She developed program plan and implementation of new program under Scientific design (control and treatment groups in a community setting) while maintaining budget and supervising staff and payroll.

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

**Alexandra (Alex) Glowacky**

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

Overview

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

Experience

BerryDunn (07/2021 to present). Alex is a staff consultant in our Medicaid practice area. 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 business analyst, Alex 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 policy analyst, Alex assists in the planning, 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 (07/2021 to present).**
Serving as the overall project coordinator Alex helps oversee a project 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. Alex performs 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 (07/2021 to present).**
Working as a policy analyst and subject matter expert for phase IV of the SUD project, Alex assisted in the development and negotiation of a Section 1115 Demonstration Project renewal to undertake further 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.

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:	Employed with BerryDunn since 01/2022
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.

**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.

**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.

**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 Illinolsan (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.

**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.

**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.

**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.

**Caitlin Cabral**

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

Overview

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

Experience

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

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

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

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

**Janine DiLorenzo**

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



Appendix B: Deliverable Dictionary

Table 4: Deliverable Dictionary

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



Appendix C: Acronyms/Abbreviations

Table 5: Acronyms/Abbreviations

Acronym/Abbreviation	Definition
APD	Advance Planning Document
BMS	Bureau for Medical Services
CL	Commodity Lines
CM	Care Management
CMS	Centers for Medicare & Medicaid Services
CSEDW	Children with Serious Emotional Disorder Waiver
DHHR	Department of Health and Human Resources
EM	Engagement Manager
FFP	Federal Financial Participation
FFS	Fee for Service
GPM	General Project Manager
HCBS	Home and Community Based Services
IAPD-U	Implementation Advance Planning Document Update
LPM	Lead Project Manager
MCO	Managed Care Organization
MITA	Medicaid Information Technology Architecture
MMIS	Medicaid Management Information System
OM	Operations Management
PE	Performance Management
PMP®	Project Management Professional®
PRTF	Psychiatric Residential Treatment Facility
QA	Quality Assurance
S&C	Standards and Conditions
SED	Serious Emotional Disorder
SME	Subject Matter Expert
SOW	Scope of Work
SPA	State Plan Amendment
SS	Support Staff



Acronym/Abbreviation	Definition
WV	West Virginia



STATE OF WEST VIRGINIA
DEPARTMENT OF HEALTH AND HUMAN RESOURCES
BUREAU FOR MEDICAL SERVICES

Bill J. Crouch
Cabinet Secretary

Procurement Services
350 Capitol Street, Room 251
Charleston, West Virginia 25301-3712
Telephone: (304) 558-1700 Fax: (304) 558-4398

Cynthia E. Beane
Commissioner

TO: Robert L. Price, CPPB, CPPO, NIGP-CPP
Administrative Services Manager II

FROM: James Atkins II *JAI*
BMS Procurement Services

DATE: April 26, 2022

RE: PF1036166, CDO BMS22*32

The West Virginia Bureau for Medical Services (BMS) respectfully requests approval of the above-referenced CDO for services performed by Berry, Dunn, McNeil & Parker, LLC under PF785940, CMA HHR21*03.

The purpose of this delivery order is for the vendor to assist BMS by providing support for the Children with Serious Emotional Disorder Waiver Initiative Phase IV project. The total not-to-exceed cost is \$1,415,520.00 The service period of this project is 05/16/2022-05/15/2024.

Thank you for your time and consideration in this matter. If you have questions or need additional information, please feel free to contact me at 304-352-4319 or james.a.atkins@wv.gov

Robert Price
Agree



STATE OF WEST VIRGINIA
DEPARTMENT OF HEALTH AND HUMAN RESOURCES
BUREAU FOR MEDICAL SERVICES

Bill J. Crouch
Cabinet Secretary

Office of Procurement Services
350 Capitol Street, Room 251
Charleston, West Virginia 25301-3712
Telephone: (304) 558-1700 Fax: (304) 558-4398

Cynthia E. Beane
Commissioner

DATE: April 28, 2022
TO: DHHR Finance
FROM: James Atkins II ^{SA}
BMS Procurement Services
RE: Funding Memo for PF1036166 CDO BMS 22*32

The Bureau for Medical Services (BMS) is submitting this funding memo related to the above-referenced Delivery Order.

BMS anticipates making payments for months 1-12 in SFY23 and months 13-24 in SFY24. Contract service period: 05/16/22-05/15/24. Funding allocation table below:

	CDO BMS22*32		
	CSFD Phase IV		
	5/16/22-5/15/24		
	24 Months		Total:
	PR07 SFY23 5/9/22-4/30/23	PR07 SFY24 5/1/23-5/15/24	
EM	48 Hours @ \$270=\$12,960	48 Hours @ \$270=\$12,960	\$25,920.00
LPM	120 Hours @ \$215=\$25,800	120 Hours @ \$215=\$25,800	\$51,600.00
GPM	2,960 Hours @ \$175=\$518,000	3,040 Hours @ \$175=\$532,000	\$1,050,000.00
SS	1,800 Hours @ \$80=\$144,000	1,800 Hours @ \$80=\$144,000	\$288,000.00
	700,760.00	714,760.00	1,415,520.00

Thank you for your consideration. If you have any questions or need additional information, please do not hesitate to contact me at 304-352-4319 or at

james.a.atkins@dhhr.wv.gov