



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: 05-11-2022

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 BMS2200000040 1	Procurement Folder:	1042902
Document Name:	Organization Development Services Project	Reason for Modification:	
Document Description:	Organization Development Services 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  <b>22</b> <b>FILE LOCATION</b> _____
	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: \$611,620.00

Purchasing Division's File Copy

**ENTERED**

CN 5/23/2022

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:**

Organization Development Services Project

Dates of Services 6/13/2022 - 6/30/2023

Total: \$611,620.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$17,200.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-06-13	2023-06-30				

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

Lead Project Manager: Base Year One

Hourly Rate: \$215.00

Ed Daranyi 80 Hours @ \$215 = \$17,200

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$13,500.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-06-13	2023-06-30				

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

Engagement Manager: Base Year One

Hourly Rate: \$270.00

Nicole Becnel 50 hours @ \$270 = \$13,500

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$315,000.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-06-13	2023-06-30				

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

General Project Manager: Base Year One

Hourly Rate: \$175.00

Peter Alfrey 900 hours @ \$175 = \$157,500

Susan Chugha 900 hours @ \$175 = \$157,500

Total 1,800 hours @ \$175 = \$315,000

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$265,920.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2022-06-13	2023-06-30				

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

**Extended Description:**

Project Management Support Staff: Base Year One

Hourly Rate: \$80.00

Benjamin Uhrich 1,664 hours @ \$80 = \$133,120

JT Smith 600 hours @ \$80 = \$48,000

Erbina Bailey 500 hours @ \$80 = \$40,000

Jordan Ramsey, Molly Hawkinson, Caitlin Cabral, Janine DiLorenzo, Jonathan Williams, Emily Hendrickson, Karla Fossett, Carole Ann Guay, Bethany Pike 560 hours @ \$80 = \$44,800

Total 3,324 hours @\$80 = \$265,920



May 5, 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 Organization Development Services Project under our contract (#HHR21\*03). As stated in the SOW document, the duration of this work is estimated to be 12 months. BerryDunn agrees to a SOW start date effective June 13, 2022. Assuming a start date of June 13, 2022, the work would then conclude on June 30, 2023.

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

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

Best Regards,

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

Nicole Y. Becnel  
Principal  
681-313-8905



**Staffing Plan and Scope of Work for the  
West Virginia Department of Health and Human Resources and  
Bureau for Medical Services  
Organization Development Services Project  
Prepared for CMA #HHR21\*03**



**Submitted by:**

Nicole Becnel, PMP®, Principal  
Eduardo Daranyi, PMP®, Principal  
Berry Dunn McNeil & Parker, LLC  
300 Capitol Street, Suite 1610  
Charleston, WV 25301  
Phone: 681.313.8905  
Phone: 207.541.2244  
nbecnel@berrydunn.com  
edaranyi@berrydunn.com

**Submitted on:**

May 5, 2022

**berrydunn.com**



## **Staffing Plan and Scope of Work for the West Virginia Department of Health and Human Resources and Bureau for Medical Services Organization Development Services Project**

This scope of work (SOW) describes the tasks BerryDunn will perform to assist the West Virginia (State) Department of Health and Human Resources (DHHR) and Bureau for Medical Services (BMS, Bureau) with organization development (OD) services. This SOW is henceforth referred to as the OD Services Project SOW. This work will be completed in accordance with the terms and conditions of the Certified Master Agreement (CMA) Number HHR21\*03 BMS Project Management Services contract between BerryDunn and West Virginia DHHR.

### **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 OD Services Project.

The objective of this project is to provide OD services to support BMS that will aim to:

- Build off of OD activities from the Medicaid Information Technology Architecture (MITA) State Self-Assessment (SS-A) Maintenance and Annual Update Assistance Project (MITA Project) in 2020 – 2021
- Support integration of ongoing and future BMS Medicaid Enterprise System (MES) and other system initiatives, as well as the enhancement of BMS MITA assessments
- Focus on activities and OD services to help BMS further develop a strengths-based executive strategy, establish a talent management strategy, and further support the use of BMS key performance indicators (KPIs)

The OD Services Project will help BMS develop a strengths-based executive strategy and talent management strategy for the Bureau. It will also assess current BMS strengths and priority vulnerabilities and establish a BMS OD strategy for 2022 and beyond. The OD Services Project will report key findings through executive work sessions, web surveys, and analysis of current BMS documentation and KPIs to build the BMS OD strategy.

The OD Services Project will also aid the State in meeting several of its identified MITA-specific goals, such as:

- Improve the State's effectiveness and efficiency
- Improve operational efficiency and reduce costs in the healthcare system
- Promote an environment that supports flexibility, adaptability, and rapid response to changes in programs and technology
- Promote an enterprise view that supports enabling technologies that align with Medicaid business processes and technologies



- Improve the management of member and provider data, so it is timely, accurate, usable, and easily accessible to support analysis and decision-making for healthcare management and program administration

Estimates for this SOW are based on the following assumptions:

- All project documents—including meeting outcomes, action items, issues, risks, and decisions—will be on the BerryDunn SharePoint site and will be brought to the attention of the BMS project sponsor.
- Deliverables will be provided in an agreed-upon format.
- The State leadership team will consist of Cindy Beane as the BMS project sponsor and Sarah Young as the BMS project lead.
- State staff with the required knowledge base to support the OD Services Project will attend project-related meetings, such as executive work sessions. If these individuals are not available or do not participate in the project meetings, then the project schedule, scope, and cost might be impacted.
- The State project leads will provide timely decision-making and responses to information requests from the BerryDunn project team.
- The State intends to utilize the Medicaid Management Information System (MMIS) Implementation Advance Planning Document (IAPD) (formerly the MITA Advanced Planning Document (APD)) for the purposes of this SOW. The Centers for Medicare & Medicaid Services (CMS) has previously approved the MMIS IAPD on February 15, 2022, for total State and federal funds in the amount of \$56,989,025 under project identifier WV-2022-01-24-MMIS-MITA IAPDU. The estimated cost of the services to be delivered under this SOW is \$611,620 (included in the approved IAPD). 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 Eduardo Daranyi as the lead project manager and Peter Alfrey as the project lead.
- This work is projected to continue for 12 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 high-level timeline for the activities described below is provided in Section 5.0.

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

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
1.0	<p><b>Engagement Oversight</b></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 the 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"><li>Deliverable 1: Commissioner Briefing</li></ul> <p><i>Completion Criteria</i></p> <p>Engagement Oversight will be deemed complete upon signature acceptance of the Project Closeout Summary by the BMS project sponsor or their designee.</p>	Eduardo Daranyi Nicole Becnel Peter Alfrey	400
2.0	<p><b>Project Initiation, Execution, and Control</b></p> <p><i>Service Approach</i></p> <p>Upon project initiation, BerryDunn will host a project kickoff meeting. 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 the 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"><li>Facilitating meetings, preparing meeting materials, and taking notes for BerryDunn- and State-owned meetings.</li></ul>	Eduardo Daranyi Nicole Becnel Peter Alfrey Susan Chugha Benjamin Uhrich Joseph T. (JT) Smith Erblina Bailey Jordan Ramsey Molly Hawkinson Caitlin Cabral Janine DiLorenzo Jonathan Williams Emily Hendrickson	1,600



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none"><li>Preparing monthly project status updates, risks, issues, decisions, and briefings for the State leadership team.</li><li>Storing the project documentation repository in an agreed-upon SharePoint location.</li></ul> <p><b>Deliverable(s)</b></p> <ul style="list-style-type: none"><li>Deliverable 2: Monthly Status Report</li><li>Deliverable 3: Meeting Facilitation, Materials, and Notes</li></ul> <p><b>Completion Criteria</b></p> <p>Project Initiation, Execution, and Control will be deemed complete upon successful completion of the project and signature acceptance of the Project Closeout Summary by the BMS project sponsor or their designee.</p>	Karla Fossett Carole Ann Guay Bethany Pike	
3.0	<p><b>Planning Activities</b></p> <p><b>Service Approach</b></p> <p>BerryDunn will deliver a Project Timeline and Project Schedule that will outline the timing, plan, and approach both at an executive level and in detail for the delivery of OD services to BMS. BerryDunn will also manage project logs (action items, decisions, issues, and risks tracking) to support the delivery of OD services.</p> <p><b>Deliverable(s)</b></p> <ul style="list-style-type: none"><li>Deliverable 4: Project Timeline</li><li>Deliverable 5: Project Schedule</li><li>Deliverable 6: Risks, Issues, Action Items, and Decisions Log</li></ul> <p><b>Completion Criteria</b></p> <p>Planning Activities will be deemed complete upon successful completion of the deliverable(s) and signature acceptance of the Deliverable Acceptance Forms (DAFs) by the BMS project sponsor or his/her designee.</p>	Eduardo Daranyi Nicole Becnel Peter Alfrey Susan Chugha Benjamin Uhrich JT Smith Erblina Bailey Jordan Ramsey Molly Hawkinson Caitlin Cabral Janine DiLorenzo Jonathan Williams Emily Hendrickson Karla Fossett Carole Ann Guay Bethany Pike	724
4.0	<p><b>OD Roadmap and Services</b></p> <p><b>Service Approach</b></p> <p>BerryDunn will provide OD services aligned with the</p>	Eduardo Daranyi Nicole Becnel Peter Alfrey	2,350



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>OD Roadmap presented to the State in December 2021 that focuses on four strategic priorities for BMS:</p> <ul style="list-style-type: none"><li>• Establishing a strengths-based executive strategy for the Bureau</li><li>• Planning for BMA talent development</li><li>• Building BMS team structures and human resources process alignment</li><li>• Evolving the shared vision across DHHR Bureaus to optimize services for DHHR beneficiaries</li></ul> <p>Based on the OD Roadmap, OD services will include an executive strategic OD retreat with the BMS Commissioner and Deputy Commissioners that will focus on the strategic direction for the Bureau. OD services will also include executive work sessions and debriefs with BMS business area and process owners to evaluate progress on updates on BMS strategy and performance and to make plan adjustments. The number of and time dedicated to the executive strategic OD retreat, executive work sessions, and debriefs will be confirmed with the BMS project sponsor and BMS project lead during the Project Initiation phase of the OD Services Project.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"><li>• Deliverable 7: OD Implementation Plan</li><li>• Deliverable 8: Web Surveys (up to two Web Surveys during the duration of the project)</li><li>• Deliverable 9: Leadership Development and Training Plan</li><li>• Deliverable 10: Team-Building Lean Plan</li><li>• Deliverable 11: KPI Evaluation Plan</li></ul> <p><i>Completion Criteria</i></p> <p>OD Roadmap and Services will be deemed complete upon successful completion of the deliverable(s) and signature acceptance of the DAFs by the BMS project sponsor or his/her designee.</p>	<p>Susan Chugha Benjamin Uhrich JT Smith Erblina Bailey Jordan Ramsey Molly Hawkinson Caitlin Cabral Janine DiLorenzo Jonathan Williams Emily Hendrickson Karla Fossett Carole Ann Guay Bethany Pike</p>	
5.0	<p><b>Project Closeout</b></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 Summary will document the disposition or reassignment of all action items, issues,</p>	<p>Eduardo Daranyi Nicole Becnel Peter Alfrey Susan Chugha Benjamin Uhrich</p>	180



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>and risks that remain open to an agreed-upon State operations team member.</p> <p><b><i>Deliverable(s)</i></b></p> <ul style="list-style-type: none"><li>• Deliverable 12: Project Closeout Summary</li></ul> <p><b><i>Completion Criteria</i></b></p> <p>BerryDunn services will be considered complete when the State project sponsor or his/her designee formally accepts and signs the Project Closeout Summary.</p>	<p>JT Smith</p> <p>Erbline Bailey</p> <p>Jordan Ramsey</p> <p>Molly Hawkinson</p> <p>Caitlin Cabral</p> <p>Janine DiLorenzo</p> <p>Jonathan Williams</p> <p>Emily Hendrickson</p> <p>Karla Fossett</p> <p>Carole Ann Guay</p> <p>Bethany Pike</p>	
<b>Total Hours</b>			<b>5,254</b>
<b>Total Not-To-Exceed Cost Estimate</b>			<b>\$611,620</b>



### 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	50	\$13,500
1	LPM	\$215	Eduardo Daranyi	80	\$17,200
4	GPM	\$175	Peter Alfrey	900	\$157,500
4	GPM	\$175	Susan Chugha	900	\$157,500
5	SS	\$80	Benjamin Uhrich	1,664	\$133,120
5	SS	\$80	JT Smith	600	\$48,000
5	SS	\$80	Erbline Bailey	500	\$40,000
5	SS	\$80	Jordan Ramsey Molly Hawkinson Caitlin Cabral Janine DiLorenzo Jonathan Williams Emily Hendrickson Karia Fossett Carole Ann Guay Bethany Pike	560	\$44,800
			Total Hours:	5,254	\$611,620

EM = Engagement Manager

LPM = Lead Project Manager

GPM = General Project Manager

SS = Support Staff



## 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	5	7	150	277	439	\$50,969
Month 2	4	7	150	277	438	\$50,968
Month 3	4	6	150	277	437	\$50,968
Month 4	4	6	150	277	437	\$50,968
Month 5	4	7	150	277	438	\$50,969
Month 6	4	7	150	277	438	\$50,969
Month 7	4	6	150	277	437	\$50,968
Month 8	4	7	150	277	438	\$50,968
Month 9	4	7	150	277	438	\$50,968
Month 10	4	7	150	277	438	\$50,968
Month 11	4	6	150	277	437	\$50,968
Month 12	5	7	150	277	439	\$50,969
<b>Total</b>	<b>50</b>	<b>80</b>	<b>1,800</b>	<b>3,324</b>	<b>5,254</b>	<b>\$611,620</b>



## 4.0 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
1.0 Engagement Oversight												
2.0 Project Execution and Control												
3.0 Planning Activities												
4.0 OD Roadmap and Services												
5.0 Project Closeout												



**BerryDunn Authorized Signature**

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

*Nicole Y. Beanel* 2022.05.05  
10:01:37 -04'00'

Signature

Date

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

**Cynthia Beane,  
MSW, LCSW**

Digitally signed by: Cynthia Beane, MSW, LCSW  
DN: CN = Cynthia Beane, MSW, LCSW email =  
cynthia.e.beane@wv.gov C = US O = Medical  
Services OU = WV DHHR  
Date: 2022.05.10 09:42:45 -05'00'

Signature

05/10/2022

Date



## Appendix A: Resumes

### Nicole Becnel, PMP®

Proposed Project Role:	Engagement Manager
Role at BerryDunn:	Principal, employed with BerryDunn since June 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



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**Eduardo Daranyi, MEd, PMP**

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<b>Proposed Project Role:</b>	Lead Project Manager
<b>Role at BerryDunn:</b>	Principal, employed with BerryDunn since September 2005
<b>Years of Experience Relevant to Proposed Role:</b>	20 years
<b>Certifications and Education:</b>	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](http://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.



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**Peter Alfrey, PMP, Prosci® CCP, LSSGB**

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<b>Proposed Project Role:</b>	General Project Manager
<b>Role at BerryDunn:</b>	Senior Manager, employed with BerryDunn since March 2014
<b>Years of Experience Relevant to Proposed Role:</b>	14 years
<b>Certifications and Education:</b>	MA, History, Providence College BA, Journalism and Communication, Spanish Minor, University of Oregon Certified Project Management Professional LEAN Six Sigma Green Belt Certification Prosci® Certified Change Practitioner

**Overview**

Peter is an experienced project manager and healthcare operations professional with an extensive record of leading successful projects, providing program management oversight, and managing healthcare operations and process improvement initiatives. From his work establishing a data governance council at the Vermont Green Mountain Board in 2014 to leading various projects and serving as a program manager for the West Virginia Department of Health and Human Resources and Bureau for Medical Services, Peter brings comprehensive knowledge about health plan operations, process improvement, procurements and vendor management, and best practices that support Medicaid and health and human services client initiatives. He has a proven record of leading and collaborating with large, cross-functional teams to support system implementations, data management initiatives and policy initiatives.

**Relevant Experience****BerryDunn (03/2014 to present).**

- **West Virginia Bureau for Medical Services (BMS)**
  - *Enterprise Portfolio Management Office (EPMO) (09/2018 to present).*

Peter provides strategic direction for BerryDunn's EPMO team and for specific DHHR/BMS projects in the areas of project management best practices; process improvement; project staffing and recruiting; project funding and advance planning document (APD) development; and research and tracking of industry trends to support current and future EPMO projects. In addition, he is the program manager for the EPMO's Medicaid enterprise system, managed care organization (MCO) and data/analytics programs providing program oversight. EPMO projects and programs include:



- *Organization Development Services (Scheduled to start 06/2022)*
- *Public Health Emergency (PHE) Support (12/2021 to present)*
- *Access to Care (09/2021 to present)*
- *Medicaid Enterprise System Modernization Strategy and Procurement—Phase I and II (10/2020 to present)*
- *MCO Encounter Data Quality—Phases I and II (06/2020 to 02/2022).*
- *Mental Health Parity and Behavioral Health Services Support (05/2020 to present)*
- *Data Improvement Project—Phases I, II and III (09/2019 to present)*
- *Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project (09/2019 to present)*
- *Mountain Health Trust (MHT) MCO Procurement Assistance Project Phases I and II (06/2019 to 06/2021), and MHT Re-Procurement (03/2020 to present)*
- *Contact Tracing (04/2020 to 09/2020)*
- *Coordinated Care Management Project Management and Procurement Assistance / Mountain Health Promise (MHP) Implementation Project Management Support and Operational Readiness Review (02/2019 to 06/2020) and MHP Re-Procurement (10/2021 to present)*
- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (09/2020 to present).*
- *Substance Use Disorder (SUD) Waiver Initiative Project (07/2017 to 03/2019).*

Peter was the project manager for the SUD waiver initiative leading the implementation of the “Creating a Continuum of Care for Medicaid Enrollees with Substance Use Disorders” Section 1115 waiver demonstration effective January 1, 2018, to December 31, 2022, which allows the State to strengthen its SUD delivery system to improve the care and health outcomes for State beneficiaries with SUD through expanded SUD service coverage and the introduction of new programs to improve the quality of care. He managed a large, cross-functional team focused on areas such as annual and quarterly reporting to CMS and financial reporting requirements for budget-neutrality, future technology procurements to support the five-year demonstration, and MCO contract requirements specific to the SUD demonstration.
- *Asset Verification System (AVS) Project Management Services and Procurement Assistance (04/2017 to 02/2018).*

Peter served as project manager for the AVS project that supported the State’s objective of procuring AVS-related services for the State’s Medicaid program. Under Peter’s leadership and coordinating with the State, the project team developed and facilitated the request for quotation (RFQ) process that supported the procurement and development of the RFQ, evaluation of three vendor proposals, and implementation of the winning vendor in 2018.



- *Project Management of MMIS Procurement, DDI, and Certification (10/2014 to 12/2016).*

Peter served as a business analyst for the project, providing project management support and system integration testing (SIT) and user acceptance testing (UAT) support prior to the go-live implementation of the system. He also led efforts for the reviews of MMIS and provider deliverables across a team of BerryDunn professionals coordinating updates to the deliverables prior to the go-live date. Peter served as the MCO and DW/DSS lead overseeing the transfer of historical data from the four State MCOs to the new MMIS that went live in January 2015; providing project management support for testing of historical encounter data before and after the implementation coordinating efforts of the four MCOs and the fiscal agent; and overseeing testing efforts for transferring data from the MMIS to the State's DW/DSS in 2015 as the project transitioned from DDI to operations.

- **West Virginia Children's Health Insurance Program (WVCHIP)**

- *Operational Readiness Review (09/2020 to 01/2021)*
- *MCO Transition Planning Project Phases I and II (03/2019 to present).*

Peter provides project oversight to help the State integrate the WVCHIP member population with the State's Medicaid population to the MHT managed care program by January 1, 2021.
- *Out of Pocket Maximum (05/2021 to present)*

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

- *Integrated Eligibility Solution (IES)/People's Access to Help (PATH) DDI Project Management (08/2018 to 11/2019).*

Peter served as the organizational change management (OCM) lead for the IES, providing strategic direction and oversight to the project team. Peter built a joint team of individuals from the IES vendor, Optum, and BerryDunn to launch the OCM program and supporting communications campaign. During that time, OCM became a core component of the IES/PATH project. Through Peter's leadership, the OCM team created an OCM plan to launch OCM efforts for the project; created a communications toolkit and communications materials; and conducted over 50 interviews with individuals across DHHR for an OCM readiness assessment to support the IES/PATH project.

- **New Jersey Division of Medical Assistance and Health Services – MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 08/2017).**

Peter supported testing efforts for New Jersey MMIS implementation in areas such as SIT test case and results review, SIT test case analysis, UAT support, and UAT defect management. Such testing support leveraged and reused best practices and documentation from the West Virginia MMIS procurement in 2015.



- **Vermont Green Mountain Care Board (GMCB) – Vermont Health Care Uniform Reporting and Evaluation System (VHCURES) Independent Review, Procurement Assistance, and Project Management (05/2014 to 09/2014).**

Peter led the efforts to help the GMCB build a data governance council in less than four months, helping develop the data governance council charter and structure as well as policies and procedures, and facilitating the data governance council's first public-facing meetings. He also supported the review and refinement of the existing business case, oversight of business requirements development, and identification of optimal collaboration points between the selected implementation vendors.

- **Maryland Health Benefit Exchange (HBE) – Independent Verification & Validation (IV&V) for Maryland's HBE Implementation (03/2014 to 04/2014).**

As a business analyst, Peter worked with Maryland's Project Management Office and its strategic partners to coordinate projects. He monitored risks and issues across key assessment areas—such as project management; operations and maintenance; training; quality management and testing; requirements management; architecture; software development tools and release management; software product development, operations, and maintenance; and security.

**Martin's Point Health Care (12/2008 to 02/2014).** As the operations manager, Peter provided performance monitoring, process improvement, project management, data management, and operational efficiency and effectiveness for Martin's Point's Medical Management group. He managed cross-functional teams to implement complex projects; managed vendor relationships and contract negotiations; and served as client contact for external care management vendors.

**Health Dialog (07/2006 to 11/2008).** As Implementation Project Manager, Peter oversaw operational planning, execution, and reporting of multi-faceted projects for new and existing clients (health plans, large employers, and government care management programs), including BlueCross BlueShield (various regions), Capital Health Plan, and CMS. He also managed cross-functional implementation teams, maintained communications with clients, set expectations regarding scope, and managed implementation schedules while managing multiple, concurrent implementations. He also served as Project Management Office lead for company's smoking cessation nicotine replacement solution and initiative overseeing product development work and collaboration with third-party vendor.

#### **Presentations**

*Facilitator, "Workshop: Outcomes Based Certification", Medicaid Enterprise Systems Conference (MESCC), Boston, MA, August 2021.*

*The 2020 Final Rule—Understanding new flexibilities to control costs and deliver care, a BerryDunn blog, 11/2020*

*Podcast, "Medicaid and Children's Insurance Program (CHIP) Managed Care Monitoring and Oversight Tools", 11/2020.*

*Podcast, "Resumption of Normal Operations: PHE Considerations for States", 09/2020.*



*COVID-19 and Opportunities to Reboot Managed Care*, a BerryDunn blog, 09/2020

*The Case for Data Governance in the Modular Medicaid Enterprise*, a BerryDunn blog, MESC, 09/2016

Session abstract *"State Roundtable on Section 1115: Substance Use Disorder (SUD) Demonstrations; Updates from states who are implementing Section 1115 Waivers to combat the opioid crisis. Focus on opportunities and challenges in each state, opportunities for partnership and collaboration, leverage and reuse"* selected by MESC organizers for a conference in Portland, Oregon, featuring representatives from West Virginia, Virginia, and Massachusetts, 09/2016

*Innovation in a Digital Era: Using Data to Pivot to "the New"* presentation for MESC 2016, co-presented with a BerryDunn colleague and professionals from Accenture plc (Accenture), 09/2016



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**Susan Chugha**

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

**Overview**

Susan has over 14 years of administrative management experience, as well as five years' experience in consulting work. She has excellent organizational skills, experience with research and project coordination, and experience with various scheduling programs.

**Relevant Experience**

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

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



appropriate individuals are granted access, and contributing to the design of dashboards and all other aspects.

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

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

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

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

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



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

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

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



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**Benjamin Uhrich, PhD, CCP**

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<b>Proposed Project Role:</b>	Staff Support
<b>Role at BerryDunn:</b>	Senior Consultant, employed with BerryDunn since May 2022
<b>Years of Experience Relevant to Proposed Role:</b>	11 years
<b>Certifications and Education:</b>	<p>Bachelor of Arts in Psychology, University of North Carolina Greensboro</p> <p>Master of Arts in Industrial-Organizational Psychology, East Carolina University</p> <p>Doctor of Philosophy in Organizational Science, University of North Carolina Charlotte</p> <p>Certified Executive Coach, Assenter Coaching</p> <p>Prosci Certified Change Management</p> <p>Everything DISC Workplace® Certification</p> <p>Assessment Certification Workshop, Center for Creative Leadership</p>

**Overview**

Benjamin is an experience consultant with expertise in leadership development, talent management, organizational change, data analytics, and social network analysis. He has demonstrated success in designing and implementing analyses, surveys, and trainings. He has worked in both public and private entities to develop leadership skills and enact process improvements.

**Experience**

**Macklenburg County (September 2019 to May 2022).** Benjamin worked as a Senior Human Resources (HR) Consultant to develop a new enterprise competency model. He advised key changes to the annual organization-wide survey to include employee engagement. He designed and implemented evaluation strategy for core leadership courses, improved leaders' time management, communication, and process improvement skills through coaching engagements, and proposed a new performance management process that has been approved by County leadership.

**Atrium Health (August 2017 to September 2019).** Benjamin worked as a Senior HR Consultant to develop a new enterprise competency model for 38,000 employees. He built and validated team assessment for learning application and knowledge gap identification, designed enterprise processes for DISC and 360 assessments, including a DISC workshop delivered to 100+ leaders and teammates, and designed eLearning courses on continuous improvement



that saw over 10,000 completions. Benjamin designed and executed standardized performance improvement and career development planning, as well as targeted succession planning with impact to 200+ leaders and teammates. He ran a successful implementation and impact assessment of a pilot 6-month leader onboarding program for 15 new leaders hired in a 3-month span

**Duke Energy (March 2017 to August 2017).** Benjamin worked as a Change Management Specialist to lead mobile deployment communications for a \$500M full-enterprise initiative. He developed and implemented change communications plan for the program to an audience of over 17,000 people.

**Center for Intentional Leadership (August 2015 to May 2016).** Benjamin worked as a Development Specialist to design a structured interview assessment to improve client intake efficiency. He also developed client feedback survey, authored the report on client feedback to enhance recruitment and retention strategies, and created train-the-trainer manual for core workshop.

**Press Ganey (May 2015 to September 2015).** Benjamin worked as a Reporting Specialist and a subject-matter expert on development of an employee burnout assessment. He delivered custom analyses and engagement consultation for key clients.

**Piedmont Natural Gas (June 2014 to August 2014).** Benjamin worked as the Organizational Effectiveness Intern to validate field worker selection processes by reviewing pre-employment testing. He provided clarity to executive management around employee engagement survey results and developed employee onboarding enhancements grounded in best-practices

**Ingersoll Rand (May 2013 to May 2014).** Benjamin worked as a Talent Assessment and Development Consultant to improve the skillset of over 100 global managers as project manager for engagement coaching training. He also served as subject-matter expert on the selection of a new engagement survey vendor that provided service and budget efficiencies. He also designed and delivered virtual training on job analysis and success profiles to global HRBPs.

**Duke University Medical Center (June 2011 to August 2011, May 2010 to August 2010).** Benjamin worked as a Training Consultant responsible for designing and deploying eLearning on employee retention, organizational change, goal-setting, and preventing vicarious trauma. He conducted job analyses and created structured interview for key entry-level positions. Benjamin also created a leadership competency assessment and development program for leaders.



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**Joseph T. Smith, MBA**

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Proposed Project Role:	Support Staff
Role at BerryDunn:	Staff Consultant, employed with BerryDunn since January 2022
Years of Experience Relevant to Proposed Role:	7 years
Certifications and Education:	Regent Bachelor of Arts, Marshall University Master of Business Administration, concentration in Finance, Marshall University

**Overview**

Joseph is currently a Staff Consultant with BerryDunn who previously worked as an Intern in 2021 on the West Virginia (WV) Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) project, the DHHR Medicaid Enterprise Data Solution (EDS) Implementation, and the WV Data Improvement Project (DIP). During his studies for his Master's in Business Administration, he worked with the developing Case Analyses that effectively change corporate structure and provide better development strategies. His consistent and dependable skillset in strategic planning, IT support, and account management have allowed him to succeed in detail-oriented roles in a variety of office settings.

**Experience**

**BerryDunn (January 2022 to present).** As a Staff Consultant in BerryDunn's Medicaid Practice Area, Joseph works on the following projects.

- **WV Bureau for Medical Services (BMS):**
  - *Home and Community Based Services (HCBS) (10/2021 to present).* Joseph serves as a Project Coordinator for taking notes and creating agendas for various American Rescue Plan Act (ARPA) meetings involving HCBS.
  - *MES MSP Project (06/2021 to present).* Joseph serves as a research analyst researching various States Medicaid Module implementations and contracts. Joseph served on a team analyzing Vendor Request for Information (RFI) responses to provide estimated outcomes for the MES MSP teams Strategic Plan presented to the State.
  - *Medicaid Management Information System (MMIS) Implementation Advance Planning Document Update (IAPD-U) (07/2021 to present).* Joseph assists in the updating of the primary IAPD-U document with current and future projects that BerryDunn assists the State with.



- **WV Department of Health and Human Resources (DHHR):**
  - **Medicaid EDS (10/2021 - Present).** Joseph serves as a Project Coordinator creating agendas and taking notes for various DHHR/IBM meetings. He creates and maintains the EDS Status Report for each month, and coordinates updates between project leads.
  - **MITA SS-A Maintenance and Annual Update Assistance (07/2021 - Present).** Joseph provides research and performs Gap Analyses to confirm current as-is and to-be for various MITA business process forms (BPF). He provides support updating the MITA status report provided to the State.

**BerryDunn Intern (June 2021 – December 2021).** Joseph researched and developed a Medicaid Module Comparison Sheet for WV Medicaid Modernization & Procurement Project. He developed the deliverable for updated training methods on Medicaid Enterprise Systems. He also assisted in updating the WV-Advance Planning Documentation.

**Cabell-Wayne Association of the Blind (June 2019 to June 2021).** Joseph worked as a website developer who developed the backend and front-end for consumers and employees. He provided hands-on support for consumer events.

**Frank Rivas MD (August 2018 to July 2019).** Joseph worked as an IT support technician to troubleshoot and fix computer errors, teach computer skills to new employees and manage the point-of-sale system.



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**Erbolina Bailey**

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<b>Proposed Project Role:</b>	Support Staff
<b>Role at BerryDunn:</b>	Project Coordinator with BerryDunn since April 2022
<b>Years of Experience Relevant to Proposed Role:</b>	5 years
<b>Certifications and Education:</b>	Bachelor of Science in Economics, West Virginia State University

**Overview**

Erbolina is an experienced economist and Human Resources professional with a track record of solving complex strategic and operational HR challenges at corporate level. She has strong business acumen and specializes in project management, onboarding training, HRIS compliance, regulatory compliance, accountability monitoring and change management.

**Relevant Experience**

**BerryDunn (04/2022 to Present).** Erbolina provides project coordination and monitors project risks and issues to help projects stay on track and ensures meetings are appropriately documented and deadlines are met.

**Stonerise (12/2018 to 04/2022).** Erbolina worked as a Corporate HR Coordinator to assist in steering HR regulatory compliance and onboarding programs across the enterprise (corporate division, 17 transitional care centers, and 9 home health agencies) comprised of 3,000+ employees. She led HR in the shift from paper-based documentation to 100% electronic. She was responsible for heavy scheduling, coordinating, and documentation. Erbolina advised leadership on federal/state regulations, assisted in developing company policies and procedure, trained HR representatives, and collaborated closely with them on multi-HR functions driving success of care center. She accelerated time to hire 25% by identifying redundancies and streamlining onboarding processes. Additionally she introduced and facilitated two academic-practice partnerships between Stonerise and nursing schools.

**N3 (1/2018 to 12/2018).** Erbolina worked as a Customer Success Manager with Microsoft Azure to manage more than 80 client relationships. She facilitated meetings and engaged with client stakeholders to identify and support their business needs by leveraging Azure solutions. Erbolina performed assessments and analyses to optimize value realization by engaging partnerships and ensuring progress reporting and delivery of services. She also influenced client strategy and future growth of Microsoft by cultivating client preference for solutions that drove impact for them and establishing Microsoft as a leader through new reference cases.

**TQL (06/2017 to 01/2018).** Erbolina worked as an Account Executive to coordinate third-party transportation services, research transportation costs, and negotiate freight rates on inbound/outbound deliveries for multimillion-dollar companies. She achieved 99% average



delivery rate on all assignments with no loss of materials or assets and increased overall profit margins by 20% over a year.

**Jordan Ramsey**

<b>Proposed Project Role:</b>	Support Staff
<b>Role at BerryDunn:</b>	Senior Editor, employed with BerryDunn since July 2019
<b>Years of Experience Relevant to Proposed Role:</b>	10 years
<b>Certifications and Education:</b>	MA, English: Professional Writing, Southeastern Missouri State University BA, Liberal Arts and Sciences, English Literature and Creative Writing, University of Illinois at Urbana-Champaign

**Overview**

Jordan is a senior writer/editor in BerryDunn's Government Consulting Group and team lead of Editorial/QA. He provides document quality assurance and editing for BerryDunn client deliverables and marketing/communications documents. Jordan is a Poynter American Copy Editors Society (ACES) Certified Editor and holds a MA in English: Professional Writing.

**Relevant Experience**

**BerryDunn (07/2019 to present).** In his role as senior writer/editor, Jordan manages a team of editors and proofreaders who work in Portland, ME, and remotely across the country. He was responsible for implementing a new submission ticketing system for Editorial/QA, as well as organizing multiple years of fiscal year Editorial/QA data, communicating with consultants regarding edits and turnaround times, and creating and providing multiple writing presentations.

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

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

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

**Southeast Missouri State University (2015 to 2017).** As a graduate assistant, Jordan taught English Composition and aided in the delivery of the Introduction to Creative Writing course, leading workshops in poetry and fiction and facilitating group work. In addition, he wrote book



reviews and reviewed authors' submissions for the *Big Muddy*, an online journal published by the Southeast Missouri State University Press.

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

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

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

**Other Teaching Experience (2006 to 2010).**

- **Lanier Technical College:** As adjunct instructor, Jordan created curriculum and instruction of multiple English courses, including Remedial English, Introduction to Composition, and Technical Writing. He taught approximately 90 students per quarter and served as English tutor for the College Student Success Program.
- **Hardin County, IL:** Jordan taught English at the elementary, middle, and high school levels as a substitute teacher.

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



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**Molly Hawkinson**

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

**Overview**

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

**Relevant Experience**

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

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

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



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**Caitlin Cabral**

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Proposed Project Role:	Support Staff
Role at BerryDunn:	Editor 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**

**BerryDunn (09/2021 to present).** As a member of BerryDunn's Editorial/QA team, Caitlin is responsible for 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.

**QualityMetric (08/2020 to 09/2021).** 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 (01/2019 to 05/2020).** 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. (01/2019 to 05/2019).** 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 (09/2018 to 05/2020).** 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.



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**Janine DiLorenzo**

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

**Overview**

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

**Experience**

**BerryDunn (January 2022 to present).** Janine is responsible for proofreading, copyediting, and formatting various types of documents, including proposals, reports, memos, presentations, and meeting notes.

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

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

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



2013)

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

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

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



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**Jonathan Williams**

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<b>Proposed Project Role:</b>	Support Staff
<b>Role at BerryDunn:</b>	Staff Editor, employed with BerryDunn since February 2019
<b>Years of Experience Relevant to Proposed Role:</b>	15 years
<b>Certifications and Education:</b>	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](http://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.

**Emily Hendrickson**

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

**Overview**

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

**Relevant Experience**

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

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

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

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

**Civil Consultants (09/1999 to 07/2014).** As an administrative assistant, Emily provided daily



front-desk management of engineering and surveying firm—typing, editing and proofreading proposals, project submittals, and correspondence to clients and governmental agencies; printing and assembling reports; general administrative support. She acted as point of contact for customer inquiries for surveying or engineering needs; assisted clients in retrieving project materials; maintained paper and electronic filing. While there, she was also responsible for graphic design work for projects and advertising.

**Gene 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.



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**Karla Fossett, MFA, Prosci® CCP**

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

**Overview**

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

**Relevant Experience**

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

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

**EZAuctionNet (September 2010 to February 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.



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**Carole Ann Guay**

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Project Coordinator with BerryDunn since October 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 (October 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) (March 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 (September 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 (November 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 (May 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 (January 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 (October 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 (August 2016 to December 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 (January 2017 to July 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 (April 2017 to June 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 (November 2014 to June 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.



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**Bethany Pike**

<b>Proposed Project Role:</b>	Project Management Support Staff
<b>Role at BerryDunn:</b>	Project Coordinator with BerryDunn since July 2012
<b>Years of Experience Relevant to Proposed Role:</b>	17 years
<b>Education and Certification</b>	Southern Maine Community College

**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.



## Appendix B: Deliverable Dictionary

**Table 4: Deliverable Dictionary**

Deliverable #	Deliverable Name	Deliverable Description
1	Commissioner Briefing	On a monthly basis, BerryDunn will develop and deliver a status report to BMS leadership. The project status report will include a status of project deliverables and timelines, as well as associated project issues and risks.
2	Monthly Status Report	On a monthly basis, BerryDunn will develop and deliver a status report to BMS leadership. The project status report will include a status of project deliverables and timelines, as well as associated project issues and risks.
3	Meeting Facilitation, Materials, and Notes	In support of project-related meetings, BerryDunn will supply meeting facilitation, materials, and notes in all BerryDunn-owned meetings. Assistance with meeting facilitation, materials, and notes outside of meetings that BerryDunn did not schedule will require approval by the BMS project sponsor and the BerryDunn project manager.
4, 5	Project Timeline and Project Schedule	The Project Timeline and Project Schedule will outline the timing, plan, and approach both at an executive level and in detail for the delivery of OD services to BMS.
6	Risks, Issues, Action Items, and Decisions Log	BerryDunn will develop and maintain project action item, risk, issue, and decisions logs for the life of the project.
7	OD Implementation Plan	BerryDunn will develop a plan that outlines planning and roadmap for BMS OD activities in 2022 and beyond.
8	Web Surveys	BerryDunn will administer up to two web surveys to gain insights into BMS staff and leadership perceptions of the Bureau, focusing on areas such as leadership, strategy, workforce, operations process improvement, person-centered service, and program outcomes.
9	Leadership Development and Training Plan	BerryDunn will develop a Leadership Development and Training Plan to support BMS in its efforts to help its employees gain and develop leadership competencies and prepare them for roles within the Bureau. This plan



Deliverable #	Deliverable Name	Deliverable Description
		will be a long-term and personalized plan targeted at the unique needs of BMS and its employee.
10	Team-Building Lean Plan	BerryDunn will deliver a Team-Building Lean Plan that will outline activities for future BMS communications initiatives, teamwork, conflict, decision-making, Lean process improvement, and customer service.
11	KPI Evaluation Plan	BerryDunn will deliver a KPI Evaluation Plan to help BMS establish and monitor KPIs and program outcomes used for BMS process improvements. As part of this plan, the BerryDunn team will compile a baseline report of KPIs and identify specific actions to help ensure accuracy and accessibility of data. Part of this plan will support communication mechanisms and training to increase transparency and understanding of KPIs to use to identify opportunities for improvement.
12	Project Closeout Summary	The Project Closeout Summary will be an inventory of all project documentation and deliverables and documentation of 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
ACA	Affordable Care Act
APD	Advance Planning Document
BMS	Bureau for Medical Services
Bureau	Bureau for Medical Services
CCP	Certified Change Practitioner
CFR	Code of Federal Regulations
CL	Commodity Line
CMS	Centers for Medicare & Medicaid Services
CMA	Certified Master Agreement
DAF	Deliverable Acceptance Form
DHHR	Department of Health and Human Resources
DHHS	Department of Health and Human Services
E&E	Eligibility & Enrollment
EDS	Enterprise Data Solution
EM	Engagement Manager
EPMO	Enterprise Project Management Office or Enterprise Portfolio Management Office
GPM	General Project Manager
HBE	Health Benefit Exchange
IAPD	Implementation Advance Planning Document
IAPDU	Implementation Advance Planning Document Update
IES	Integrated Eligibility Solution
IT	Information Technology
JRP	Joint Requirements Planning
KPI	Key Performance Indicator
LPM	Lead Project Manager
MCO	Managed Care Organization
MES	Medicaid Enterprise System



Acronym/ Abbreviation	Definition
MESC	Medicaid Enterprise Systems Conference
MHP	Mountain Health Promise
MHT	Mountain Health Trust
MITA	Medicaid Information Technology Architecture
MMIS	Medicaid Management Information System
MSP	Modernization Strategy and Procurement
OCM	Organizational Change Management
OD	Organization Development
PEA	Provider Enrollment Application
PMP®	Project Management Professional®
POS	Point of Sale
QA	Quality Assurance
RFQ	Request for Quotation
SIT	System Integration Testing
SOW	Scope of Work
SS	Support Staff
SS-A	State Self-Assessment
State	West Virginia
SME	Subject Matter Expert
UAT	User Acceptance Training
WVCHIP	West Virginia Children's Health Insurance Program



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 *SAD*  
BMS Procurement Services

**DATE:** May 11, 2022

**RE:** PF1042902, CDO BMS22\*40

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 Organization Development Services project. The total not-to-exceed cost is \$611,620.00 The service period of this project is 06/13/2022-06/30/2023.

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

*[Faint signature]*

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*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: May 11, 2022  
TO: DHHR Finance  
FROM: James Atkins II *JA-II*  
BMS Procurement Services  
RE: Funding Memo for PF1042902 CDO BMS 22\*40

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

BMS anticipates making payments for months 1-10 in SFY23 and months 11-12 in SFY24. Contract service period: 06/13/22-06/30/23. Funding allocation table below:

CDO BMS22*40			
ODS Project			
6/13/22-6/30/23			
12 Months			
	PR07 SFY23 Months 1-10	PR07 SFY24 Months 11-12	Total:
EM	41 Hours @ \$270=\$11,070	9 Hours @ \$270=\$2,430	\$13,500.00
LPM	67 Hours @ \$215=\$14,405	13 Hours @ \$215=\$2,795	\$17,200.00
GPM	1,500 Hours @ \$175=\$262,500	300 Hours @ \$175=\$52,500	\$315,000.00
SS	2770 Hours @ \$80=\$221,600	554 Hours @ \$80=\$44,320	\$265,920.00
	509,575.00	102,045.00	611,620.00

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