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: 06-05-2024

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 0506 3022 WIC2400000005 1	**Procurement Folder:**	1441798
Document Name:	Berry Dunn Project Management for WIC XRUG Prod Mgt Office	**Reason for Modification:**	
Document Description:	Berry Dunn Project Management for WIC XRUG Prod Mgt Office		
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

Vendor Customer Code: 000000100150
BERRY DUNN MCNEIL & PARKER LLC
2211 CONGRESS ST

PORTLAND   ME   04102

US
Vendor Contact Phone: 6813138905   **Extension:**

Discount Details:

	Discount Allowed	**Discount Percentage**	**Discount Days**
#1	No	0.0000	0
#2	No		
#3	No		
#4	No		

DEPARTMENT CONTACT

Requestor Name: Stephanie B Romano
Requestor Phone: 304-352-4852
Requestor Email: stephanie.b.romano@wv.gov

24
FILE LOCATION_____

INVOICE TO

PURCHASING DIRECTOR 304-356-4116
HEALTH AND HUMAN RESOURCES

BPH - NUTRITION SERVICES

350 CAPITOL ST, RM 515

CHARLESTON   WV 25301-3717

US

SHIP TO

PURCHASING DIRECTOR 304-356-4116
HEALTH AND HUMAN RESOURCES

BPH - NUTRITION SERVICES

350 CAPITOL ST, RM 515

CHARLESTON   WV 25301-3717

US

Total Order Amount:	$1,373,990.00

Purchasing Division's File Copy

CH 6/6/24
PURCHASING DIVISION AUTHORIZATION
DATE: 6/6/24
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION
DATE: 6-10-24
ELECTRONIC SIGNATURE ON FILE

Extended Description:

Berry Dunn Project Management for WIC Crossroads Users Group (XRUG) Product Mgt Office services

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		$0.0000	$156,600.00
Service From	**Service To**	**Manufacturer**		**Model No**	**Delivery Date**
2024-10-01	2026-05-31				

Commodity Line Description: Engagement Manager: Optional Renewal Year One

Extended Description:
Engagement Manager: Optional Year One

Hourly Rate: $270.00
580 hours

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		$0.0000	$21,070.00
Service From	**Service To**	**Manufacturer**		**Model No**	**Delivery Date**
2024-10-01	2026-05-31				

Commodity Line Description: Lead Project Manager: Optional Renewal Year One

Extended Description:
Lead Project Manager: Optional Renewal Year One

Hourly Rate: $215.00
98 Hours

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		$0.0000	$666,720.00
Service From	**Service To**	**Manufacturer**		**Model No**	**Delivery Date**
2024-10-01	2026-05-31				

Commodity Line Description: General Project Manager: Optional Renewal Year One

Extended Description:
General Project Manager: Optional Renewal Year One

Hourly Rate: $180.00
3704 Hours

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		$0.0000	$529,600.00
Service From	**Service To**	**Manufacturer**		**Model No**	**Delivery Date**
2024-10-01	2026-05-31				

Commodity Line Description: Project Management Support Staff: Optional Renewal Year One

Extended Description:
Project Management Support Staff: Optional Renewal Year One

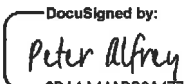Hourly Rate: $80.00
6620 Hours

b) BerryDunn

May 7, 2024

To Whom It May Concern:

BerryDunn submitted a Staffing Plan and Scope of Work (SOW) document to the Department of Health, Bureau for Public Health, to provide Women, Infants, and Children (WIC) Crossroads User Group (XRUG) Product Management Office (PMO) services under our master contract (CMA #HHR21*03). As stated in the SOW document, the duration of work is estimated to be 20 months. BerryDunn agrees to a SOW start date of October 1, 2024. The work would then conclude on May 31, 2026.

BerryDunn will honor the pricing and terms and conditions of the agreement in place past the expiration date and through the duration of project.

Sincerely,

DocuSigned by:

Peter Alfrey

—2DAAA44ADB3A477...

Peter Alfrey

Principal

West Virginia Department of
HEALTH

5.0 Signatures

BerryDunn Authorized Signature

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

DocuSigned by:

Peter Alfrey

2DAAA44ADB3A477...

_____   4/10/2024
Signature   _____
                                                                       Date

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

Heidi E. Staats

_____   6/4/24
Signature   _____
                                                                       Date

Agreed

Heather White

BerryDunn

b BerryDunn

West Virginia Department of HEALTH

Bureau for Public Health
Office of Nutrition Services
Crossroads User Group
Product Management Office 4

Staffing Plan and Scope of Work
October 1, 2024 – May 31,2026
Prepared for HHR 21*3

Submitted by:
Julie Sullivan, MPH, MBA, PMP®, Engagement Manager
jsullivan@berrydunn.com
Danni Ricks, Product Manager
dricks@berrydunn.com
Erica Hoffman, Co-Product Manager
ehoffman@berrydunn.com

BerryDunn
300 Capitol Street | Charleston, WV 25301 | 207-650-2048

Submitted on:
April 10, 2024

berrydunn.com

Staffing Plan and Scope of Work
for the Office of Nutrition Services Crossroads User Group
Product Management Office

1.0 Key Information

1.1 Background Information

The West Virginia (State) Department of Health (DH), Bureau for Public Health (BPH), Office of Nutrition Services (ONS) has requested continuation of product management and support services for the Crossroads Management Information System multi-state collaborative user group (XRUG). Funding for the Product Management Office (PMO) is through the US Department of Agriculture (USDA) Food and Nutrition Service (FNS) and is contingent upon availability of federal funds.

The XRUG was created in response to an initiative of the USDA FNS Special Supplemental Nutrition Program for Women, Infants, and Children (WIC) aimed at increasing efficiencies and cost-effectiveness across states by encouraging collaboration and system reuse. Known as the State Agency Model (SAM), this initiative is focused on planning, development, and deployment of model management information systems (MIS) in WIC state agencies (SAs).

The XRUG is a consortium of the WIC SAs in Alabama, Rhode Island, Virginia, and West Virginia. Alabama, Virginia, and West Virginia were part of the original consortium—along with North Carolina—that awarded a contract to Computer Sciences Corporation (CSC) in 2009 to build a SAM system called Crossroads. North Carolina is no longer part of the consortium. Since the initial contract award, CSC has been acquired and is now known as Gainwell Technologies. The procurement process began in 2018 and as of October 1, 2023, GCOM serves as the maintenance and enhancement (M&E) vendor.

Created by the XRUG Charter, the XRUG has established processes to maintain and enhance Crossroads and is the vehicle to support all SA members, including new members who implement Crossroads. The XRUG manages the Crossroads system, supports the SAs, and plays various roles in system-related processes and activities. The XRUG SAs, together with the support of the M&E contractor and PMO, are responsible for ensuring the integrity and usability of the product. In addition to the XRUG Charter, there are two other parts to the XRUG governing documents: the Change Control Process Document and the Communications Plan.

BerryDunn has served as the XRUG's PMO since 2020.

1.2 Overview

The intent of this document is to help ensure a common understanding of expectations as they relate to the deliverables and services that will be provided by the PMO for the XRUG.

The primary objectives of the PMO include, but are not limited to, providing support for XRUG operations in the following ways:

- Serving as the point of contact (POC) for all XRUG communications
- Managing risk and risk mitigation
- Assisting with the SA transfer in/out process:
  - Acting as central POC for member and non-member SAs regarding the XRUG
  - Identifying and providing governance documents relating to transfer to the Crossroads MIS
- Preparing annual M&E Advance Planning Document updates
- Creating and delivering presentations about the XRUG to potential XRUG states, as requested by the Executive Steering Committee (ESC)
- Overseeing the development of the XRUG annual report
- Coordinating the XRUG Annual Meeting
- Managing the Crossroads Change Control Process and activities, including:
  - Recommending and prioritizing Crossroads changes
  - Facilitating Change Control Board (CCB) and Task Force (TF) meetings and communications
- Providing subject matter expertise (SME)
- Leading and participating in software development life cycle (SDLC) activities
- Serving as the central source for knowledge management and collaboration, including:
  - Facilitating meetings and conference calls
  - Maintaining the XRUG Charter, Communication Plan, and other governance documents
  - Managing the M&E collaboration site (SharePoint)
- Assisting with Request for Proposal (RFP) development, release, and evaluation as necessary

This work will be completed in accordance with the terms and conditions of the master contract between BerryDunn and the State of West Virginia (HHR 21*3).

1.3 Assumptions

Estimates for this SOW are based on the following assumptions:

- The work is projected to be conducted over 20 months (estimated from October 1, 2024 – May 31, 2026).
- The Hours Estimate is based on a good faith calculation of level of effort for the PMO activities, as well as institutional knowledge gained as the PMO incumbent.

- If the actual level of effort increases or additional service requests are made, a change request may be needed. Only actual hours utilized for execution of PMO duties and tasks will be billed.
- The DH project sponsor is ONS Director Heidi Staats. The DH project lead is Lisa Donohew.
    - The **Project Sponsor**'s role is to ensure that management and stakeholders understand the value and importance of the project, help assure the success of the project, and provide necessary guidance and resources to the project team. The Project Sponsor also serves as a point of escalation should there be project concerns.
    - The **Project Lead**'s role is to provide day-to-day oversight of the project. This includes guiding internal DH project team members and assuring adherence to the project plan and timeline, serving as primary contact for the BerryDunn Project Manager, escalating any concerns if needed to the DH Project Sponsor and/or the BerryDunn Engagement Manager, and providing feedback to the BerryDunn team.
- The BerryDunn leadership team will consist of Nicole Becnel as Contract Manager, Charlie Leadbetter as Project Principal and Julie Sullivan as Engagement Manager.
    - As **Contract Manager** for BerryDunn's master contract with WV, Nicole is the point person for any contractual questions or concerns.
    - Charlie represents firm leadership as **Project Principal** and assures the overall quality of BerryDunn's work. Charlie is the point of escalation if concerns are not resolved by working with the Project Manager and Engagement Manager.
    - Julie serves as **Engagement Manager** and has primary responsibility for the quality of project deliverables, effective and efficient performance of the BerryDunn project team, and adherence to the SOW as described in this document. Julie is the first point of escalation if concerns are not resolved by working with the Project Manager.
- The BerryDunn project team will consist of Danni Ricks and Erica Hoffman as Co-Product Managers, and Melissa Chapusette providing project support.
    - As **Project Manager**, Danni leads the execution of activities as outlined in this SOW and oversees the BerryDunn project team. Danni is the primary contact for the DH Project Sponsor and Project Leads and works closely with the Project Lead to meet all project objectives.
    - As **Co-Product Manager**, Erica serves as a point of contact for the DH Project Sponsor and Project Leads. She is responsible for governance document review, meeting facilitation, vendor management, and deliverable development.

- o As Project Coordinator, Melissa provides support to the project team. She coordinates many aspects of the project including agenda development, scheduling, meeting notes, and deliverable development.
- o The BerryDunn Consulting Team has an Editorial and Quality Assurance (EQA) team who provide EQA services on this project's deliverables. The team includes Caitlin Cabral, Janine DiLorenzo, KD Dobyne, Carole Ann Guay, Megan Hamilton, Emily Hendrickson, Jordan Ramsey, Alycia Minshall, and Jon Williams.
- BerryDunn will provide deliverables in an agreed-upon format.
- The DH Project Sponsor and Project Lead will, to the extent possible, provide timely decision-making and responses to information and scheduling requests from the BerryDunn project team.
- All project documents—including meeting notes, action items, issues, risks, and decisions—will be maintained on BerryDunn's collaborative Microsoft SharePoint site. The BerryDunn team will notify relevant interested parties when key documents are uploaded.
- BerryDunn is not responsible for costs of hosting or for SA staff to attend the XRUG Annual Meetings (e.g., hotels, travel, food, conference room rental, meeting materials).
- Any requests from the Project Sponsor or Lead outside of the assumptions and deliverables listed in this document may require a Change Request process. This process includes a simple document outlining the additional task request and subsequent increase in hours and cost, submitted to the Project Sponsor for approval and then into the process in Purchasing.
- To maximize the efficiency of meetings, BerryDunn will distribute meeting materials in advance, and assumes that participants will do their best to come to meetings prepared.

2.0 Project Scope and Staffing Plan

Table 1 describes the service approach, deliverables, and completion criteria for BerryDunn's services; identifies BerryDunn team members responsible for conducting the work; and lists the estimated hours for completion of each key task. We anticipate that the actual needs of the project may vary and could require different allocation of our total hours to work activities than we have estimated at this time.

A deliverable requires formal submission to and approval by the Project Sponsor. An artifact is a document produced by the BerryDunn team during project work as part of developing one or more deliverables but is not formally submitted for Project Sponsor approval unless requested. Descriptions of the roles are in section 3.0 of the SOW. A high-level timeline for the activities described below is provided in Section 4.0.

Table 1: Service Approach, Deliverables, Completion Criteria, and Hours Estimate

Task	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
1.0	**Project Execution and Control** *Service Approach* 1.1 BerryDunn's project leadership team will provide oversight and coordination of BerryDunn staff, services, and quality assurance of deliverables. 1.2 BerryDunn's project team will meet on a weekly basis internally and with the DH project team biweekly to help ensure project progress, discuss identified risks and issues, review any pending decisions, and address action items. *The BerryDunn team will:* 1.3 Update annually the current Product Management Plan (PMP) and Project Work Plan/Schedule. The PMP outlines how the project is managed, executed, and controlled, and includes details relating to management of project processes in alignment with Project Management Institute (PMI) standards and the Project Management Body of Knowledge (PMBOK®). 1.4 Participate in Crossroads system training as determined by the XRUG. 1.5 Serve as a central point of contact (POC) for XRUG communications as defined in the XRUG Communications Plan. 1.6 Support identification of and mitigation strategies for project risks and issues and maintain a Risk and Issue Log.	Charlie Leadbetter Julie Sullivan Danni Ricks Erica Hoffman Melissa Chapusette Caitlin Cabral Janine DiLorenzo KD Dobyne Carole Ann Guay Megan Hamilton Emily Hendrickson Alycia Minshall Jordan Ramsey Jonathan Williams	3,280

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Task	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	1.7 Maintain Action Item and Decision Logs.		
	1.8 Provide monthly project status reports that contain updates on PMO, M&E Contractor, and XRUG accomplishments and activities during the reporting period; PMO and XRUG planned activities for the following reporting period; key decisions, risks, and issues; and product schedules.		
	1.9 Serve as POC for SAM transfer in or out processes, including information on the XRUG, Crossroads System, and implementation requirements; present to potential member states about the XRUG; and documentation on the XRUG when transferring in.		
	1.10 Develop XRUG Annual Report on the State of the XRUG and the Crossroads Systems, including activities and accomplishments, quantifiable measures, and other items as determined by the ESC.		
	Deliverables		
	D01 XRUG Annual Report		
	Artifacts		
	A01 XRUG Annual PMP and Project Work Plan/Schedule Revisions/Updates		
	A02 Risk and Issue Log		
	A03 Action Item and Decision Logs		
	A04 Weekly and Monthly Project Status Reports		
	Completion Criteria		
	Project Execution and Control will be deemed complete upon signature acceptance of the deliverable for this task by the Project Sponsor or their designee and completion of the Project Closeout Meeting.		
2.0	**Advance Planning Document (APD) Support**	Charlie Leadbetter	560
	Service Approach	Julie Sullivan	
	The BerryDunn team will:	Danni Ricks	
	2.1 Facilitate discussions and collect data to support development and submission of APDs to FNS, in compliance with the FNS 901 Handbook.	Erica Hoffman	
		Melissa Chapusette	
	2.2 Draft the APDs and submit to the ESC for review; incorporate feedback, revise, and finalize.	Caitlin Cabral	
	2.3 Coordinate with FNS as necessary to finalize APD submissions.	Janine DiLorenzo	
	Deliverable	KD Dobyne	
	D02a and D02b Annual M&E APD Submissions	Carole Ann Guay	

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Task	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	Completion Criteria APD Support will be deemed complete upon signature acceptance of both deliverables for this task by the Project Sponsor or their designee.	Megan Hamilton Emily Hendrickson Alycia Minshall Jordan Ramsey Jonathan Williams	
3.0	**Change Control Process (CCP) Management** *Please note a change in the items included in this area. Many PMO responsibilities are accounted for in communications time (see 1.5 above) or meeting time (see 4.2 below).* *Service Approach* *The BerryDunn team will:* 3.1 Assure documentation is available and current for Change Control Board (CCB) use, such as issue-specific information, estimates, templates, enhancement requests, etc. 3.2 Contribute technical expertise and other resources to assist the CCB to accomplish objectives, including contributing to the decision-making process on defects, enhancements, Help Desk issue tracking and resolution, funding, and other technical decisions. 3.3 Collaborate with the M&E vendor to manage the defect-tracking process using a Defect Log per the agreed-upon processes in the XRUG CCP documentation. 3.4 Manage the Change Request Log on the collaboration site. 3.5 Track and report on XRUG spending and schedules related to system changes. 3.6 Coordinate and review all M&E work of the M&E vendor, including. • Collaborating with the CCB and Release Management to identify and recommend changes to be included for each release • Reviewing issued Service Orders with the vendor to help ensure documentation is complete and accurate • Verifying the quality and completeness of M&E vendor deliverables, including validating that deliverables are complete and meet requirements per the Service Order documentation, coordinating modifications of deliverables with the M&E vendor, and reviewing to ensure documented acceptance criteria are met as defined in the XRUG CCP	Charlie Leadbetter Julie Sullivan Danni Ricks Erica Hoffman Melissa Chapusette Caitlin Cabral Janine DiLorenzo KD Dobyne Carole Ann Guay Megan Hamilton Emily Hendrickson Alycia Minshall Jordan Ramsey Jonathan Williams	1,450

Task	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	3.7 Support system enhancement design and development activities, including:		
	• Participating in detailed requirements sessions with the M&E vendor, involving XRUG subject matter experts, CCB members, and TFs for requirements validation and approval; BerryDunn will participate in up to four face-to-face design sessions annually		
	• Supporting the M&E vendor during development, including responding to questions and issues from the M&E vendor, assisting with resolution of issues, acting as the POC for XRUG acceptance of completed releases from the M&E vendor, confirming that deliverables are complete and ready for dissemination to the SAs for testing, and maintaining a log (A07) on the M&E collaboration site of which release each member state has currently implemented with the date of implementation to ensure that all operate within the current or up to two past releases of the current version		
	3.8 Coordinate User Acceptance Testing (UAT), including:		
	• Coordinating and maintaining a log on the M&E collaboration site and monitoring releases to each SA test system		
	• Verifying that SAs receive complete releases and coordinating resolution of any issues		
	• Documenting release content on the M&E collaboration site		
	• Coordinating with the M&E vendor and SAs to schedule releases to be transferred to state test environments		
	• Reviewing Release Packages for accuracy		
	• Coordinating with the M&E vendor regarding the physical transfer of Release Notes		
	• Support defect recording in a ticket-tracking system located on the M&E vendor collaboration site, review the ticket priority list via conference calls with the M&E vendor on a weekly basis, and help ensure SAs' defect documentation is in the required format and includes all relevant information required by the M&E vendor		
	• Monitoring M&E vendor correction and regression testing, including coordinating with the M&E vendor		

Task	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	regarding the scheduled correction and regression testing of identified issues, and communicating status and schedule to the XRUG via email as needed and conference calls with M&E vendor weekly		
	• Monitor SA testing thoroughness and completeness via weekly conference calls and/or email as needed.		
	• Monitoring SA regression testing of repaired system, including coordinating with SAs regarding scheduling and results of regression testing to the repaired system and updating the M&E vendor and XRUG on status via weekly conference calls		
	5.10 BerryDunn will monitor SA releases to production, including coordinating with SAs regarding the scheduling and status of each release to a production environment; maintaining a record log of which state implements each release by date, documenting issues, and coordinating with SAs regarding resolutions; and updating the M&E contractor and XRUG on status via email and weekly conference calls		
	Artifacts		
	A05 Defect Log		
	A06 Change Request Log (includes costs and releases)		
	A07 Quarterly M&E Vendor Assessments		
	Completion Criteria		
	CCP Management will be deemed complete upon the end of the Project Closeout meeting.		
4.0	**Knowledge Management and Collaboration** *Service Approach* *For all meetings, the BerryDunn team will identify meeting participants, solicit agenda topics from XRUG, identify and communicate meeting goals, develop meeting agendas, and capture meeting notes, action items, risks and issues, and decisions.* *BerryDunn will prepare and distribute agendas via email for each meeting by noon on the business day before the scheduled meeting. We will prepare and distribute meeting notes for review via email to appropriate staff within two business days of each meeting's completion. We will update meeting notes within three business days of receiving feedback from meeting attendees.* *The BerryDunn team will:* 4.1 Plan and facilitate the XRUG Annual Meeting; topics may	Charlie Leadbetter Julie Sullivan Danni Ricks Erica Hoffman Melissa Chapusette Caitlin Cabral Janine DiLorenzo KD Dobyne Carole Ann Guay Megan Hamilton Emily Hendrickson Alycia Minshall	5,538

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Task	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	include strategic planning; refining the project goals and objectives for the coming year; updating governance documents; discussing communication protocols; reviewing high-level project milestones; and identifying project risks, including documentation of continuing risks from the previous year. 4.2 Prepare for and facilitate standing meetings/ videoconference calls as defined in the XRUG Communications Plan • Change Control Board – weekly • Designated Governing Board – twice per month • Executive Steering Committee – twice per month • M&E Status – weekly • Release Management – weekly • Technical Advisory Group – monthly • PMO and SAs – monthly for SAs, weekly for PMO 4.3 Coordinate and support and/or attend additional ad hoc meetings/ videoconference calls as requested by the XRUG. • Monthly Directors Meeting • Joint Application Design (JAD) Sessions • Task Force 4.4 Maintain and coordinate annual updates/revisions to the XRUG Charter, CCP Documentation, and Communications Plan. 4.5 Manage and maintain currency of the XRUG collaborative SharePoint site hosted by BerryDunn. *Deliverable* D03 Updated XRUG Charter, CCP Documentation, and Communications Plan *Artifacts* A08 Annual Meeting Materials A09 Standing and Ad Hoc Meeting Agendas and Notes *Completion Criteria* Knowledge Management will be deemed complete upon the end of the Project Closeout meeting.	Jordan Ramsey Jonathan Williams	
5.0	**Project Closeout/Transition Out** *Service Approach* *The BerryDunn team will:* 5.1 Develop a Transition-Out Plan, including a schedule with milestones approved by the ESC, within 30	Charlie Leadbetter Julie Sullivan Danni Ricks Erica Hoffman	174

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Task	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	business days of the incoming PMO contract execution. The Transition-Out Plan will include providing the incoming PMO contractor with documentation, reports, templates, etc. and reviewing PMO operations and procedures.	Melissa Chapusette	
	5.2 Execute the Transition-Out Plan by providing support to the incoming PMO contractor to help ensure uninterrupted service to the XRUG and member SAs, for 30 business days prior to the end of BerryDunn's contract.	Caitlin Cabral Janine DiLorenzo KD Dobyne Carole Ann Guay	
	5.3 Transfer PMO collaboration site content and help ensure successful migration to the incoming PMO contractor's site.	Megan Hamilton Emily Hendrickson Alycia Minshall	
	5.4 Prepare and submit a Project Completion Summary to document the work performed under this SOW and provide the disposition of deliverables, action items, risks, issues, etc.	Jordan Ramsey Jonathan Williams	
	5.5 Conduct a project closeout meeting with key project interested parties to review the summary and capture lessons learned.		
	Deliverable		
	D04 Transition-Out Plan		
	Artifact		
	A10 Project Completion Summary and Closeout Meeting		
	Completion Criteria		
	This project will be deemed complete upon signature acceptance of the Project Completion Summary and Transition-Out Plan by the Project Sponsor or her designee.		
		Total Hours	**11,002**
		Total Not-to-Exceed Cost	**$1,373,990**

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3.0 Project Resources and Hours

The following table includes additional staffing details and total hours by resource, based on the hourly rates and staffing classifications listed for Optional Year 1 on the Commodity Line (CL) for the current contract. Please note that all possible staff from the Editing and Quality Assurance teams have been included to minimize the need for individual approvals following execution of this SOW. Any resources other than those included in Table 2 will be submitted for approval as needed. The following roles and rates were used to compute the estimated costs:

- EM = Engagement Manager ($270/hour)
- LPM = Lead Project Manager ($215/hour)
- GPM = General Project Manager ($180/hour)
- SS = Support Staff ($80/hour)

Table 2: Total Estimated Hours and Costs

CL Opt Year 1	Role	Project Resource	Rate	Est Hours	Est Cost
9	EM	Julie Sullivan	$ 270	580	$ 156,600
8	LPM	Charlie Leadbetter	$ 215	98	$ 21,070
11	GPM	Danni Ricks	$ 180	3,704	$ 666,720
12	SS	Erica Hoffman	$ 80	3,897	$ 311,760
12	SS	Melissa Chapusette	$ 80	2,660	$ 212,800
12	SS	Caitlin Cabral	$ 80	7	$ 560
12	SS	Janine DiLorenzo	$ 80	7	$ 560
12	SS	KD Dobyne	$ 80	7	$ 560
12	SS	Carole Ann Guay	$ 80	7	$ 560
12	SS	Megan Hamilton	$ 80	7	$ 560
12	SS	Emily Hendrickson	$ 80	7	$ 560
12	SS	Alycia Minshall	$ 80	7	$ 560
12	SS	Jordan Ramsey	$ 80	7	$ 560
12	SS	Jon Williams	$ 80	7	$ 560
			Total	11,002	$ 1,373,990

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Table 3 shows the total estimated hours per month, broken down by project role.

Table 3: Total Estimated Hours per Month

Month	EM Hours	LPM Hours	GPM Hours	SS Hours	Est Hours Per Month	Est Cost Per Month
1	29	5	185	331	550	$68,685
2	29	5	186	331	551	$68,865
3	29	5	185	331	550	$68,685
4	29	5	185	331	550	$68,685
5	29	5	186	331	551	$68,865
6	29	4	185	331	549	$68,470
7	29	5	185	331	550	$68,685
8	29	5	186	331	551	$68,865
9	29	5	185	331	550	$68,685
10	29	5	185	331	550	$68,685
11	29	5	186	331	551	$68,865
12	29	5	185	331	550	$68,685
13	29	5	185	331	550	$68,685
14	29	5	185	331	550	$68,685
15	29	4	185	331	549	$68,470
16	29	5	185	331	550	$68,685
17	29	5	185	331	550	$68,685
18	29	5	185	331	550	$68,685
19	29	5	185	331	550	$68,685
20	29	5	185	331	550	$68,685
Total	**580**	**98**	**3,704**	**6,620**	**11,002**	**$1,373,990**

4.0 High-Level Timeline

The following figure illustrates the proposed high-level timeline by task and month.

Table 4: Proposed High-Level Timeline by Task and Month

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
1.0 Project Management/ Annual Updates																				
2.0 XRUG Product Management																				
3.0 M&E Contractor Management																				
4.0 Advance Planning Document (APD) Support																				
5.0 CCB Process Management																				
6.0 Knowledge Management and Collaboration																				
7.0 Project Closeout/Transition																				■

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5.0 Signatures

BerryDunn Authorized Signature

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

DocuSigned by:

Peter Alfrey

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4/10/2024

_____   _____
Signature   Date

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

_____   _____
Signature   Date

6.0 Resumes

Julie Sullivan, MPH, MBA, PMP®, CCP

Proposed Project Role:	Engagement Manager
Role at BerryDunn:	Senior Manager
Years of Experience Relevant to Proposed Role:	30 years
Certifications and Education:	Master of Public Health (MPH) and MBA, University of Illinois Chicago BA, History, Northwestern University PMI Certified Project Management Professional (PMP®) Prosci® Certified Change Management Practitioner (CCP)

Overview

Julie leads BerryDunn's Public Health Practice and has 30 years of experience developing and implementing state and local governmental public health program, policy, and process improvements. Her expertise includes project management and strategy development, accreditation preparedness, process analysis and redesign, staffing analysis and planning, and policy development. Julie understands governmental public health from the inside and brings the fresh perspective of a consultant; from her ten years' experience leading and innovating as the City of Portland, Maine's Public Health Director, four years as Senior Advisor to the City Manager, and ten years of partnership with the State of Maine's Center for Disease Control, Julie knows how to build relationships, identify key decision points, and help governmental public health agencies achieve their project objectives.

Relevant Experience

BerryDunn (05/2018 to present)
Oklahoma Tobacco Settlement Endowment Trust

- *Fiscal Year (FY) 2024 Consulting Support (7/2023 to present)*
  Julie is the engagement manager on this project to provide a wide range of programmatic, policy, process, and implementation consulting services.

- *FY 2023 Consulting Support (5/2023 to 6/2023)*
  Julie served as engagement manager on this project to provide policy and procedure analysis.

Wyoming Department of Health, Public Health Division

- *Performance Management and Quality Improvement Training and Technical Assistance (7/2023 to present)*
  Julie serves as engagement manager on this project to support the development and sustainability of PMQI capacity.
- *Strategic Map Implementation (7/2023 to present)*

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Julie serves as engagement manager on this project to support implementation and monitoring of the strategic map.

West Virginia Bureau for Public Health (BPH)

- *Data Modernization and HIV/Hepatitis Elimination Plan Implementation (9/2023 to present)*
  Julie is the engagement manager on this project to implement the Data Modernization Plan as well as support implementation and monitoring for the HIV/Hepatitis Statewide Elimination Plan.
- *Tobacco Quitline RFP (9/2023 to present)*
  Julie is the engagement manager on this project to develop an RFP for a Tobacco Quitline vendor and support the procurement process.
- *Assessments and Plans (7/2023 to present)*
  Julie is the engagement manager on this project to develop the State Health Assessment, the State Health Improvement Plan, the Workforce Development Plan, and the Health Equity Plan.
- *Vaccines Grant Management and ELC Reporting (7/2023 to present)*
  Julie is the engagement manager on this project combining reporting and analysis on the Supplemental Funding for COVID-19 Vaccines grants along with several CDC ELC grants.
- *Infant and Maternal Mortality Review Panel (3/2023 to present)*
  Julie is the engagement manager for this project focused on developing policies and procedures for the review panel and creating process maps to visually depict each step. The team also created the panel's first handbook for staff detailing policies and procedures.
- *COVID-19 Supplemental Funding for Vaccines Grant Management (12/2022 to 06/2023)*
  Julie serves as engagement manager for this project providing grants management support for the Immunization Program including grant monitoring and reporting, and the annual statewide kindergarten immunization survey.
- *Accreditation Readiness Support (11/2021 to 12/2022).*
  Julie served as engagement manager on this project to conduct a state health assessment, develop a state health improvement plan, and support strategic planning, as well as developing an HIV/Hepatitis Statewide Elimination Plan, and project-managing the Policy Review Team, Performance Management/Quality Improvement Council, and the Workforce Development Workgroup.
- *Expanding Laboratory Capacity Enhancing Detection (ED), ED Expansion, and Data Modernization Initiative (05/2022 to present).*
  Julie serves as engagement manager on this project to provide reporting support and analysis for ED and EDE, and project management for the Data Modernization initiative, including supporting a new data governance structure.
- *Fiscal Management Improvement Initiative (05/2022 to present)*
  Julie serves as engagement manager on this project to support a Bureau-wide effort to identify current challenges and develop new standard operating procedures and deliver training, as well as supporting a new committee structure.
- *Health Disparities Grant Management Support (05/2022 to present).*

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Julie serves as engagement manager supporting the team to provide reporting and analysis services as well as project managing Bureau activities under the grant.

- *Multi-Grant Project Management Office (05/2021 to 05/2022).*
  Julie served as engagement manager for the team providing grants preparation and management, coordination and strategy, and project management for federal funding related to COVID-19 and immunizations, workforce, and health disparities.
- *Emergency Medical Services Data System Implementation Project Management (02/2021 to 12/2022)*
  Julie served as engagement manager supporting the team providing vendor oversight and project management for the implementation of a data system capturing the ambulance run data from around the state, and managing the licensing, credentialing, and designation processes for the state.
- *Epidemiology and Laboratory Capacity - Enhancing Detection Project Management (01/2021 to 05/2022).*
  Julie led the team providing project management services for COVID-19-related funding and activities, including staffing analysis and planning, logic model development and implementation, and disease surveillance/case investigation/contact tracing software maximization.
- *Strategic Map Implementation, Phase Two (01/2021 – 05/2021).*
  Julie managed the team focused on managing the Policy Review Team, Performance Management (PM) and Quality Improvement Council, and implementation of the numerous PM goals, as well as updating the Strategic Map.
- *Women, Infants, and Children (WIC) Crossroads Management Information System (MIS) Product Management Organization (PMO) (11/2020 to present)*
  Julie provides oversight for the team serving as the PMO for a four-state collaborative and their system maintenance and enhancement vendor.
- *Children with Special Health Care Needs Business Process Redesign and Procedure Manual Completion (03/2020 to 01/2021).*
  Julie oversaw the business process redesign and procedure manual completion for the program to align with national standards, as well as collaborating with multiple state stakeholders to develop requirements for a case management solution procurement.
- *Electronic Vital Records System Implementation (02/2020 to present).*
  Julie serves as engagement manager for the team project managing the implementation of a new electronic vital records system for the State to migrate all historical data and move from an out-of-date, paper-based system to a simple web-based platform for internal and external users, including a wide array of stakeholders across the state.
- *Emergency Medical Services Data System Procurement Support (11/2019 to 10/2020).*
  Julie led the development of a Request for Quotation and the post-procurement support for a new emergency medical services data system to allow the state and its many partner agencies to more tightly coordinate activities and access key reporting indicators, such as naloxone administration, to gain insight into opiate overdose trends in real time.
- *Strategic Map Implementation Support and Performance Management/Quality Improvement (PM/QI) Planning Project (10/2019 to 12/2020).*

Julie is the Project Manager for four work groups (workforce development, data-driven decision-making, administrative policies and procedures, and stakeholder engagement) as part of implementing the state's Strategic Map vision and is leading a process to develop and implement a Performance Management and Quality Improvement Plan. Julie coordinates with over 40 internal stakeholders to reach goals in each of the four priority focus areas.

- *HIV and Hepatitis Business Process Analysis and System Configuration (09/2019 to 06/30/2020).*
  Julie managed mapping HIV and hepatitis processes to redesign the disease investigation approach, moving from a paper-based system to leveraging existing capacity in the National Electronic Disease Surveillance System, which removed more than 30 steps from the original process. Julie and her team also developed training and implementation materials supporting the new HIV and hepatitis workflows.
- *Public Health Accreditation Preparation Project (10/2018 to 09/2019).*
  Julie worked with nearly 50 internal stakeholders to conduct a gap analysis for the approximately 350 pieces of documentation required by the Public Health Accreditation Board (PHAB). Julie identified full and partial gaps and provided a readiness score to each PHAB domain as well as a total score. The recommendations to address gaps and move closer to accreditation readiness served to inform the Strategic Map Implementation project.

West Virginia Bureau for Medical Services (BMS)

- *COVID-19 Contact-Tracing and Testing Initiative (04/2020 to 08/2020).*
  Julie served as part of team providing project management and coordination services for COVID-19 contact-tracing workforce recruitment and training, and system selection and implementation. This effort resulted in several hundred volunteer contact tracers being identified and trained, as well as expanding statewide capacity for coordinated contact tracing, case investigation, and reporting.
- *1915(c) Children with Serious Emotional Disturbance Waiver Development Project (10/2018 to 11/2019).*
  Julie conducted policy research and analysis of other states' 1115 waivers to identify best practices and trends to better meet the needs of this vulnerable population. Julie also wrote many sections of the waiver application. The State was granted this waiver and is successfully implementing these practices.
- *Data Visioning and Warehouse Development and Procurement Assistance Project (07/2018 to 01/2019).*
  Julie assisted with facilitation and gathering of RFP specifications, requirements, and test scenario development, and she co-facilitated joint requirements planning sessions.
- *Substance Use Disorder (SUD) Waiver Initiative Project (05/2018 to 11/2018).*
  Julie conducted provider network capacity analysis, and supported project reporting and evaluation for this Medicaid 1115 demonstration waiver focused on addressing the SUD epidemic.

City of Portland, Maine (05/2002 to 05/2018)

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Senior Advisor to the City Manager (07/2014 to 05/2018)

Julie led initiatives to address priorities for internal and external policy, structural, or financial challenges. She developed and implemented structural and process changes to improve rental housing safety and streamline permitting and inspections functions, which led to an annual revenue increase of over $500,000. Other projects she led include a task force to evaluate changes to adult emergency shelter system to provide effective supportive services and expand substance abuse treatment capacity for un- and underinsured clients, with annual savings of $850,000 in emergency response services alone; an evaluation of the feasibility of and proposed implementation for a new Office of Economic Opportunity focused on immigrant/refugee job linkage with employers, and the Portland Opportunity Crew, linking panhandlers with day labor, job support services, and other case management services; and a request for proposal for a new citywide IT solution to replace the legacy system.

Public Health Director (09/2004 to 07/2014)

Julie managed a $9.2 million division, doubling revenues during the first few years by expanding grant funding in key areas to meet community needs and redesigning reimbursement processes in clinical settings. She built new data analytics capacity to inform program and policy decisions, beta-tested national accreditation standards and was among first health departments to receive Public Health Accreditation Board status, and innovated program and policy initiatives for multiple federal demonstration grants, including children's exposure to violence, cancer prevention in immigrant/refugee communities, access to healthy local foods, and obesity prevention. Julie managed numerous initiatives with the State of Maine Medicaid Program to address policy and reimbursement challenges arising from the multiple clinical programs run by Portland's health department, including Health Care for the Homeless, Ryan White Positive Health Care, and School-Based Health Centers. Julie also worked with numerous external partners, including the State of Maine's Comprehensive Cancel Control Project, for which she served as an Advisory Board member; co-founded an initiative with the Portland Police Department on children's exposure to violence and changing data collection to better identify cases; and supervised a lead poisoning prevention program. Julie also partnered with the State on a three-pronged strategy to address prescription drug overdoses, including outreach to local providers to maximize the State prescription drug monitoring program, conducting outreach in the community to prevent prescription drug overdose and abuse, and workshops in the streets and at community agencies on the use of naloxone.

Health Promotion Program Manager (05/2002 to 09/2004)

Julie led a $650,000 program area including substance use disorder prevention and policy, breast and cervical health, cancer prevention, and children's oral health. This included convening a cross-disciplinary, public-private collaborative on co-occurring substance use and mental health disorders that identified duplication and gaps in the system and developing a new minority health program to connect with preventive health care services, utilizing Medicaid allowances for case managers/health outreach workers.

Chicago Department of Public Health (08/2000 to 05/2002)

As the Safe Start project director, Julie used a $3.35 million grant from the U.S. Department of Justice to create a five-year strategic plan and 18-month targeted implementation plan for coordinated, expanded system capacity in mental health, courts, healthcare, and child welfare to address the impact of exposure to violence on young children. This included developing a funding and service delivery model for infant mental health services on the south and west sides of Chicago using Medicaid resources, and convening a cross-disciplinary, public-private group to create Chicago's first child advocacy center, co-locating all relevant forensic, judicial, and supportive services.

KPMG LLP (06/1997 to 08/2000)
As a consultant and then a senior consultant, Julie analyzed and presented strategic options in potential hospital mergers and designed financial restructuring and internal financial process improvements for a Medicaid HMO and numerous other health and hospital systems around the country. She conducted Medicaid and commercial HEDIS audits for quality and effectiveness-of-care measures, as certified by the National Committee for Quality Assurance, evaluated data collection and claims processing for compliance and efficiency at Medicaid HMOs, and assessed competitive pricing and service mix for a national rehabilitation facility.

Leatrice H. Berman & Associates (08/1995 to 08/1996)
Julie developed patient materials for Medicaid managed care organizations based on national best practices. She analyzed public health measures to assess outcomes of an Illinois family violence reduction project and evaluated the efficacy of organization-wide benchmarks for patient care quality measurements for Kaiser Permanente in Northern California.

Public Allies (06/1993 to 08/1995)
Julie started the Chicago site, with Michelle Obama, of a federal AmeriCorps demonstration project. She wrote and managed federal, foundation, and corporate funding, recruited 37 municipal and nonprofit partner organizations and program participants, and developed and implemented training curricula and outcome measurement tools.

Education and Certifications

MPH and MBA, University of Illinois at Chicago
BA, History, Northwestern University
Prosci® Certified Change Management Practitioner
PMI Certified Project Management Professional®
Daniel Hanley Center for Health Leadership/Institute for Civic Leadership, Inaugural Class
Maine Public Health Work Group/Statewide Coordinating Council

West Virginia Department of
HEALTH

Charles K. Leadbetter, PMP®, Prosci® CCP

Proposed Project Role:	Lead Project Manager
Role at BerryDunn:	Principal
Years of Experience Relevant to Proposed Role:	30 years
Certifications and Education:	Bachelor of Science in Computer Science and Economics, University of Maine Orono Certified Project Management Professional® Prosci® Certified Change Practitioner

Overview

Charlie is a principal and leads BerryDunn's State Government Practice Group. He has provided executive leadership for state agencies across the country for nearly 30 years. He offers this project best practices in project oversight, project health assessments, quality assurance, independent validation and verification, project management, and engagement oversight. He has experience managing large state, high stakes projects, and utilizes project management best practices during all of his engagements.

Experience

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

- **Oregon SAIF** – *Quality Management Services (QMS) for Workers' Compensation Claims System Implementation Program (CSI Program) (04/2021 to present)*
Charlie is currently serving as project principal for the BerryDunn team that is providing independent QMS for a workers' compensation system implementation project being conducted by SAIF to modernize their claims system. The QMS services include development of a quality management, conducting of an initial risk assessment, and conducting several point-in-time IV&V checks throughout the life of the project. Through provision of QMS BerryDunn is defining the scope, responsibilities, standards, review procedures, and reporting for the CSI Program's QMS efforts, supporting risk and issue identification/management and measuring period-to-period trends in delivery and improvements on gaps, and providing regular project status reports to SAIF executive leadership and the project team.

- **Hawaiʻi Department of Health (DOH)** – *Business Process Redesign for Behavioral Health Administration (BHA) (12/2020 to 10/2021).*
Charlie is serving as project principal for this business process redesign project spanning four BHA Divisions. Key activities include performing a current environment assessment (including issuing web surveys and facilitating fact-finding sessions), facilitating business process redesign activities (including as-is and to-be business process mapping sessions), performing organizational change management, developing IT system requirements and an RFP for a solution integrator for a case management and electronic health record solution, and providing procurement support.

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- **Michigan Department of Health and Human Services (MDHHS)** – *Disease Surveillance Assessment (11/2020 to 03/2021).*
  Charlie is serving as principal on the BerryDunn team that is developing in-depth assessments and providing recommendations for MDHHS' disease surveillance system modernization efforts.
- **Minnesota Department of Employment and Economic Development (DEED)** – *Audit, Risk Assessment (including a Technical and Security Review) of Unemployment Insurance (UI) Strategic Program (10/2020 to present)*
  Charlie is the project principal responsible for the BerryDunn team that is conducting two point-in-time independent risk assessments, project audits, technical reviews, and security reviews of DEED's UI Strategic Program. This project is intended to improve the current UI system's flexibility, enable the program to respond quickly to policy change, and enhance user experience for applicants and employers. BerryDunn is helping to ensure the solution meets development best practices and standards, help ensure that architecture discipline is maintained, identify risks and issues and security vulnerabilities during development that could be corrected prior to production deployment, and obtain an independent review of the overall quality of the system.
- **Government of New Brunswick (GNB) Department of Finance and Treasury Board** – *Enterprise Resource Planning (ERP) Project Monitoring Services (10/2020 to present)*
  Charlie is serving as project principal for a BerryDunn team that is providing independent project monitoring services throughout the life of the GNB ERP implementation project. The ERP implementation project is a business-led transformational project that will result in redesigned business processes and the implementation of a cloud-based solution for human resources, payroll, finance and procurement services. Through provision of project monitoring services BerryDunn is supporting risk management through project oversight and quality assurance services, enabling the GNB to objectively and comprehensively assess its implementation efforts, providing regular project status reports to GNB senior management and by supporting recurring assessments by measuring period-to-period trends in delivery and improvements on gaps.
- **Wyoming Legislative Service Office (LSO)** – *IT Funding Requests Study (08/2020 to 12/2020)*
  Charlie served as project principal for a BerryDunn team that conducted a study of the State's IT funding request development and review process and of specific IT funding requests selected by the Joint Appropriations Committee (JAC). The JAC hired BerryDunn to use nineteen IT funding requests as example requests, for purposes of assessing the IT funding request process—from the planning stage to the review and decision-making phase, and identification of areas for improvement and correlating recommendations to further enhance and develop the process. The JAC also directed BerryDunn to use five of the nineteen IT funding requests as case studies—for purposes of determining the sufficiency of the due diligence exercised in the planning and decision-making related to each request. BerryDunn delivered a study report to the JAC that contains our study findings, and formally presented the report to the JAC in December 2020.

- **Maine Office of Information Technology (OIT) and Office of Child and Family Services (OCFS)** – *Point-In-Time IV&V for Comprehensive Child Welfare Information System (CCWIS) (07/2020 to present)*
  Charlie is the project principal on BerryDunn's IV&V team. The team is monitoring and assessing the CCWIS implementation project on a quarterly basis during the 18-month implementation, as well as for a period of six months after implementation.
- **Maine Department of Environmental Protection (DEP)** – *Enterprise Licensing Planning (06/2020 to present)*
  Charlie is leading a BerryDunn team that is assisting the DEP in planning for the replacement of its Enterprise Licensing System. This project involves the development of functional and technical requirements, performing research into licensing systems in peer states and conducting an analysis of the overall cost of acquisition. At the conclusion of the project, BerryDunn will present a comprehensive business case for the acquisition and implementation of a next generation licensing system to executive bodies.
- **Puerto Rico Department of Health (PRDoH)** – *Health Information Technology (HIT)/Health Information Exchange (HIE) Support Services (04/2020 to present)*.
  Charlie is serving as principal on this project to assist PRDoH with planning and implementation of an HIE. Services provided BerryDunn team include performing an HIT assessment and developing recommendations and an HIT roadmap to help ensure successful establishment of the HIE. In addition, BerryDunn is providing project management services for HIE planning and implementation activities, and other support such as development of the HIT IAPD and updates to Medicaid Information Technology Architecture (MITA) State Self-Assessment (SSA) documentation.
- **Wisconsin Physicians Service Insurance Corporation (WPS)** – *Independent Assessment of the TRICARE for Life (TFL) Technology Modernization Project Implementation (04/2020 to present)*.
  Charlie is leading a BerryDunn team conducting an independent and objective assessment of the compliance of the new TFL system with contractual and regulatory standards applicable to WPS.
- **West Virginia Bureau for Public Health (BPH)**
  - *Enhancing Laboratory Capacity-Enhancing Detection (ELC-ED) Project Management (10/2020 to present)*
  - *Children with Special Health Care Needs Business Process Redesign and Procedure Manual Completion (03/2020 to present)*
  - *Electronic Vital Records System Implementation (02/2020 to present)*
  - *Emergency Medical Services Data System Procurement Support (11/2019 to 10/2020)*
  - *Strategic Map Implementation Support and Performance Management/Quality Improvement Planning (10/2019 to present)*
  - *HIV and Hepatitis Workflow/Business Process Analysis and System Configuration (09/2019 to 06/2020)*
  - *Public Health Accreditation Preparation Project (10/2018 to 09/2019)*

- **Minnesota Management and Budget (MMB)** – *IT Funding Model Evaluation (01/2020 to present).*
  Charlie is leading a review and assessment of the current model for funding the MMB's enterprise IT systems. The engagement includes an evaluation of the current and future enterprise system needs, recommendations for developing technologies that may address these needs, and development of financial strategies to adequately fund the state's enterprise IT systems on a long-term basis.
- **Minnesota Department of Labor and Industry (MN DLI)** – *Workers' Compensation Modernization Program Assessment/Audit (10/2019 to 04/2020).*
  Charlie served as principal for an independent risk assessment and program audit of the Workers' Compensation Modernization Program, which is an effort to build a state-of-the-art workers' compensation system. The assessment/audit included a program management review, security review, architecture review, and technology solution assessment for the purposes of helping to ensure the solution meets development best practices and standards, helping to ensure that architecture discipline is maintained, identify risks and issues during development that could be corrected prior to production deployment, and obtain an independent review of the overall quality of the system.
- **Georgia Department of Administrative Services** – *Comprehensive Business Process Review and Redesign Project (08/2019 to present).*
  BerryDunn is conducting an end-to-end process review, from the submission through collection of the administrative fees. Charlie is project principal for the team that is identifying major pain points in the process, and providing recommendations for alleviating those pain points and avoiding current errors. The team will provide information and recommendations on successful practices and related systems used by other states for the same process.
- **Vermont Agency of Education** – *Shared School District Data Management System Services (05/2019 to present).*
  BerryDunn is providing development and implementation of the next version of the AOE's Accounting Handbook. The Handbook will be the single guidance document for all SUs/SDs, and will be designed to help ensure consistent accounting practices.
- **Kentucky Department of Revenue** – *IV&V Services for Integrated Tax System (06/2019 to present).*
  Charlie serves as project principal overseeing IV&V services for the DOR's integrated tax system project. During this five-year project BerryDunn is providing documentation of issues and risks and monitoring and reporting on their resolution or mitigation. The team also makes recommendations for corrective action along with strategies to execute those recommendations.
- **West Virginia Department of Health and Human Resources (DHHR)** – *Child Welfare Initiatives Project Management Services (10/2018 to present).*
  Charlie is serving as the project principal providing project management services to the West Virginia DHHR, working to strengthen the execution of priority BCF initiatives by helping to ensure that programmatic and policy changes are being managed to support the State project teams and the people making funding, prioritization, resourcing, and technical decisions.

- **Oregon Enterprise Technology Services (OR ETS)** – *Integrated IT Service Management (ITSM) (03/2018 to present).*
  Charlie is overseeing BerryDunn's project with the OR ETS department to provide business analysis services in support of the ITSM system project. Business analysis services include providing documentation, analysis, process improvement workshop facilitation, and requirements gathering. The purpose of the ITSM system project is to provide efficiency and effectiveness enhancements that could lead to OR ETS providing greater value to its customers.
- **New Hampshire Department of Revenue Administration (DRA)** – *Tax System Business Requirements and RFP Development with IV&V Services (2016 to present).*
  Charlie is the project principal for the DRA's migration from a tax information management system to the selection of a new RIMS. DRA issued an RFP for a RIMS in August 2017, and Charlie oversaw BerryDunn's role in guiding the DRA through the proposal scoring process. Charlie is currently overseeing the BerryDunn team in providing project health assessments (Quality Assurance) for the three-year implementation of RIMS.
- **New Hampshire Liquor Commission (NHLC)** – *Project Management for Next Generation Retail Business Systems (03/2011 to 01/2012; 04/2016 to present).*
  The NHLC embarked on an initiative to document its major business processes, develop IT system requirements, and write an RFP for acquisition of a new merchandising, warehousing, and point-of-sale (POS) IT system. BerryDunn led the documenting of business processes and systems requirements for the Administration and Enforcement and Licensing Divisions of the NHLC. As follow-on work, BerryDunn provided quality assurance services related to system implementation. Charlie is currently overseeing BerryDunn's project management and oversight responsibilities for the implementation.
- **Vermont Judiciary** – *Next Generation Case Management System (NG-CMS) Planning and Implementation Services (12/2015 to present).*
  Charlie is the project principal for the BerryDunn team in supporting the Judiciary with project management services for the planning and implementation of its NG-CMS, including the development of a project charter, system planning and procurement oversight, and project management of the CMS implementation.
- **New Mexico Corrections Department (NMCD)** – *COTS Offender Management System (OMS) Replacement (10/2015 to 06/2020).*
  Charlie is project principal, leading the BerryDunn project team in providing the NMCD with high-level requirements definition, RFP development, procurement support, contract negotiation, gap analysis, as well as project management and quality assurance throughout the OMS selection life cycle.
- **Vermont Agency of Digital Services (ADS)** – *Independent Reviews (07/2012 to present).*
  Charlie has been project principal for multiple independent reviews of large IT-related initiatives for Vermont agencies. These reviews, required under State statute by the Office of the CIO, involve independently evaluating the vendor contracts, project planning and management activities, soundness of the proposed solutions, and State readiness to implement the systems.

- **Puerto Rico Department of Health (PRDoH)** – *Health Information Technology (HIT)/Health Information Exchange (HIE) Support Services (04/2020 to present).*
  Charlie is serving as principal on this project to assist PRDoH with planning and implementation of an HIE. Services provided BerryDunn team include performing an HIT assessment and developing recommendations and an HIT roadmap to help ensure successful establishment of the HIE. In addition, BerryDunn is providing project management services for HIE planning and implementation activities, and other support such as development of the HIT IAPD and updates to Medicaid Information Technology Architecture (MITA) State Self-Assessment (SSA) documentation.
- **Arizona Department of Economic Security (ADES)** – *AALMPP Feasibility Study (04/2020 to 02/2021).*
  Charlie is leading a team that is assisting the ADES in planning for the replacement of three legacy mainframe systems. This project involves performing a requirements analysis, alternatives analysis, and a cost benefit analysis to develop a comprehensive Implementation Advanced Planning Document (IAPD) and a DDI Statement of Work to procure replacement systems.

- **Indiana State Department of Health Maternal and Child Health (MCH)** – *Data System Assessment (08/2019 to 09/2020).*
  Charlie is project principal for this project to assess the current MCH data systems and end user applications, identify gaps and make recommendations, and develop requirements to enable the MCH Division to procure services and solutions needed to meet future data systems' needs. These needs include, but are not limited to health information exchange (HIE) systems interoperability; robust Extract, Transform, and Load (ETL) processes; provider access and information sharing, and data management as it relates to Title V block grant MCH national performance measures and State of Indiana-specific initiatives.

- **West Virginia Department of Health and Human Resources (DHHR)** – *Child Welfare Initiatives Project Management Services (10/2018 to present).*
  Charlie is serving as the project principal providing project management services to the West Virginia DHHR, working to strengthen the execution of priority BCF initiatives by helping to ensure that programmatic and policy changes are being managed to support the State project teams and the people making funding, prioritization, resourcing, and technical decisions.

- **West Virginia Bureau for Medical Services (BMS)** – *COVID-19 Contact Tracing and Testing Initiative (04/2020 to 08/2020)*

- **Arizona Department of Economic Security/Division of Developmental Disabilities (ADES/DDD)** - *Focus HIPAA TCS Compliance Project (04/2019 to 10/2019).*
  Charlie was the project principal for this engagement to perform an assessment and gap analysis of DDD's compliance and alignment with HIPAA- and CMS- transactions and claim processing code sets and to develop alternatives and an IT roadmap to close gaps and achieve the desired future state.

- **Washington Health Benefit Exchange (WAHBE)** – *O&M System Integrator Re-Procurement Planning (05/2018 to 05/2019).*
  Charlie provided leadership and oversight to this engagement to assess, define requirements, and develop an RFP for the re-procurement of an O&M system integrator for the WAHBE.

- **Vermont Department of Health Laboratory** – *Project Management and Technical Support for STARLIMS Implementation (02/2017 to 06/2018).*
  Charlie was project principal leading our team that provided project management oversight for the implementation of the department's laboratory information system.

- **South Carolina Department of Health and Environmental Control (DHEC)** – *EHR System Planning and Procurement Assistance (09/2016 to 05/2018).*
  Charlie served as project principal for this project with DHEC to plan for selection and implementation of an EHR. Key activities for this project included assessing the current environment, guiding DHEC through its vision for the desired future state, and performing a needs assessment. Additionally, the project team facilitated joint requirements planning sessions, developed system requirements, and developed an RFP for the EHR.

- **Hawai'i Department of Human Services Med-QUEST Division (MQD)** – *Organizational and Business Process Redesign (07/2017 to 04/2018).*
  Charlie provided project leadership for this initiative to review studies, analyze documented operational processes, observe current workflow patterns, conduct interviews with key personnel, and gather information on current barriers to improving efficiency. The project will culminate in process improvement recommendations and strategies to implement proposed changes.

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

  - *Uniform Reporting Requirements and Specialized Programs Project (02/2015 to 10/2016).*
    Charlie was principal for this project, working with AHS and Pacific Health Policy Group to develop uniform reporting requirements and business processes via the HSE to support state and federal reform initiatives.

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

  - *Medicaid Enterprise Solution Risk Assessment, Cost Benefit Analysis, and Implementation Advance Planning Document (IAPD) Development (02/2011 to 04/2011).*
    Charlie oversaw a risk assessment for Vermont's Medicaid Enterprise System

replacement project, as the State considered alternatives for replacing its outdated Medicaid Management Information System (MMIS).

- **West Virginia Bureau for Children and Families (BCF)** – *Project Management for Enterprise Content Management Project (08/2015 to 08/2016).*
  As project principal, Charlie is providing oversight to the BerryDunn team's collaboration with BCF to develop as-is business processes that depict how the BCF conducts major processes today and identify where bottlenecks, challenges, and redundancies exist.

- **Vermont Green Mountain Care Board (GMCB)** – *Vermont Health Care Uniform Reporting and Evaluation System (VHCURES) Independent Review, Procurement Assistance, and Project Management (01/2014 to 05/2015).*
  Charlie served as project principal for an initiative to support the GMCB with project management services to support the planned improvements in data processing, security, and usability of the VHCURES data resource. This support included the review and refinement of the existing business case, oversight of business requirements development, and identification of optimal collaboration points between the selected implementation vendors, among other project management tasks.

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

  o *Next Generation Systems Planning Project and MITA SS-A (05/2011 to 02/2015).*
    Charlie served as project manager for Massachusetts' Next Generation Systems Planning Project. The initial effort was to complete a MITA SS-A for the Departments of Developmental Services (DDS), Mental Health (DMH), and Public Health (DPH). The CMS MITA SS-A framework was leveraged to enable the agencies to define the current state of their major business processes and technical environment to determine which areas should be matured in order to meet their business needs and vision. Our team listed and prioritized the State's goals, documenting the core business processes by agency, and completing both the as-is and to-be assessment of business and technical capabilities. We then leveraged the information gained from these activities and assisted the agencies in the development of a Consolidated Requirements Document, which served as the basis for the procurement of the next generation system(s). BerryDunn then supported the development of the RFP and worked with EOHHS to procure the next generation system.

  o *State Medicaid Health IT Planning and IAPD Development (10/2010 to 04/2011).*
    BerryDunn led the development of Massachusetts' State Medicaid Health IT Plan (SMHP), as required by the American Recovery and Reinvestment Act and Health Information Technology Economic and Clinical Health Act. The SMHP serves as the strategic vision for EOHHS as it moves forward with the development of health information technology (HIT) and information exchange activities and will become a critical component of the overall Commonwealth HIT Plan. Following the development of the SMHP, BerryDunn developed the IAPD, which set forth the Commonwealth's funding request and cost justification to

CMS. Charlie served as project director for this engagement, where he was responsible for four core teams of BerryDunn and subcontractor resources, along with subject matter experts and other project resources.

- **Maryland Health Benefit Exchange (HBE)** – *IV&V for Maryland's HBE Implementation (11/2012 to 04/2014).*
  Charlie led BerryDunn's team to provide IV&V for Maryland's HBE implementation, to fulfill the State's health insurance eligibility and enrollment functionality and plan management, presentment, and selection. As principal, Charlie oversaw the quality of services provided by our project management team, our four core team analysts, and our pool of subject matter experts and analysts.

- **New Hampshire Governor's Commission on Medicaid Expansion** – *Consulting Services for Medicaid Eligibility Expansion Study (07/2013 to 10/2013).*
  Charlie led a team that provided consulting services to a bi-partisan Commission established by the New Hampshire governor to study a possible Medicaid expansion for the State. The team's services were focused on process design for the Commission deliberations as well as report development and writing. In addition to leading the Feasibility Study project, Charlie led the writing of the Report of the Commission to Study Expansion of Medicaid Eligibility that the Commission provided to the State legislature.

- **West Virginia Offices of the Insurance Commissioner (OIC)** – *Health Insurance Exchange (HIX) Planning (06/2011 to 06/2013).*
  BerryDunn worked with the OIC on several key activities, most notably leading the development of the State's HIX IT Strategic Plan, which serves as a strategic roadmap for to guide the State in complying with Affordable Care Act (ACA) requirements and timelines. We also led the development of the HBE Business Plan and Financial Sustainability Model; developed an RFI for HBE systems vendors; provided grant-writing support; provided project management for several initiatives; facilitated the Plan Management workgroup; and provided policy analysis in areas such as financial management. Charlie served as principal for this engagement, providing project oversight and high-level management of the project team.

- **Missouri Department of Mental Health (DMH)** – *Electronic Medical Record System Assessment and Long-Range Information Strategy Plan (03/2013 to 04/2013).*
  BerryDunn completed an independent assessment of DMH's current information systems, as well as future information system needs as defined by DMH management and the HITECH Act. Based on the team's evaluation, BerryDunn developed an Information Strategy Plan to identify gaps between the current and long-range business and technical needs and provide a roadmap for DMH to acquire, develop, and/or integrate clinical information systems to optimize efficiency and meet state/federal regulatory requirements.

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

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

- **Connecticut Department of Public Health (DPH)** – *Business Analysis of Licensing and Credentialing System (10/2007 to 04/2008).*
  BerryDunn conducted a business needs assessment and workflow analysis of the processes DPH completed for its licensing and credentialing system. For this project, the team documented technical and functional requirements and developed a logical system design document that outlined the necessary business, technical, and system interface requirements and created an entity relationship model. Charlie served as project manager for this engagement. BerryDunn's analysis provided the requirements necessary for DPH to create an RFP to procure a new system.

- **West Virginia Bureau for Medical Services (BMS)** – *Quality Assurance Oversight of MMIS and Pharmacy POS Implementation (04/2003 to 03/2008).*
  BerryDunn worked in partnership with the State's BMS to assess the development and implementation of the MMIS replacement and Pharmacy POS system and help ensure that the systems developed met stated business and technical requirements. Charlie served as part of BerryDunn's project team to provide independent quality assurance services for the State's MMIS implementation.

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

  - *IV&V for Medicaid Decision Support System (DSS) Implementation (01/2003 to 06/2005).*
    Charlie served as project manager for BerryDunn's engagement to provide IV&V services for New Hampshire's Medicaid DSS implementation, which involved analyzing issues, risks, and system impacts and providing recommendations to mitigate these potential problems. As project manager, Charlie served as liaison with the State and vendor project teams, oversaw the services provided by BerryDunn's teams, and led the development of BerryDunn's deliverables.

  - *Project Management for Enterprise Data Warehouse Project (09/2001 to 03/2002).*
    Charlie facilitated enterprise data warehouse system design discussions and developed business and technical recommendations for 24 user-defined reports for two primary divisions within DHHS. Project tasks included mapping data elements required for each report to the back-end system, determining report and data security requirements, developing report layouts and technical specifications, and facilitating stakeholder meetings with 70 end users that achieved both end-user support for the processes and documented business and technical specifications of each identified report. The project also included

recommendations for a strategic department-wide reporting environment using warehouse data.

Danni Ricks, Prosci® CCP

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	5 years
Certifications and Education:	Regents Bachelor of Arts West Virginia University with Minors in Health Promotion and Professional Writing
	Lean Six Sigma Green Belt
	Prosci® Certified Change Management Practitioner
	MLC Certified Medicaid Professional (MCMP-II)
	WV Infant and Toddler Specialist (WVIT Certification)

Overview

Danni is a senior consultant in BerryDunn's State Government Practice Group, focusing on Public Health. She is a certified Prosci® Change Management Practitioner and Medicaid Learning Center (MLC) Certified Medicaid Professional (MCMP-II). She is experienced in project coordination, vendor management, and process mapping and redesign. She is experienced in Request for Proposal (RFP) and requirements development, and well-versed in meeting and workgroup organization and facilitation.

Experience

BerryDunn (11/2018 to present). As a staff consultant, Danni is responsible for project coordination, which includes client outreach, scheduling, facilitation of meetings, note taking, document review, research, and business analysis.

- **West Virginia Bureau for Public Health (BPH)**

  - *WIC Crossroads User Group Product Management Office (06/2020 to present) The WIC PMO project provides product support and vendor facilitation for the maintenance and enhancement of the Crossroads system. The PMO provides support for the Crossroads User Group (XRUG) which includes West Virginia, Virginia, Alabama, and Rhode Island. Danni supports the WIC PMO as product manager with business analysis, including governance document review, RFP support, and strategic planning. Danni also offers vendor facilitation and project management for the XRUG.*

  - *Infant and Maternal Mortality Review Panel Project Management Support (04/2023 to 10/2023). As deputy project manager, Danni collaborates with the project manager to oversee the development and delivery of project deliverables including state best practice research, process maps, and procedure guides. She works collaboratively with the client to coordinate project meetings and monitor progress towards established project goals.*

- o *Emergency Medical Services Data System Post-Implementation Support (05/2022 to 12/2022).*
  Danni served as the project manager for the Office of Emergency Medical Services (OEMS) data system post-implementation project. The project involves the review and revision of OEMS policies and procedures. She provides support for business process redesign through business analysis, process mapping (as-is and to-be), and process redesign. Danni also monitors compliance with the vendor contract requirements and negotiates the workload for the understaffed OEMS. As part of vendor management, she mitigates risks and issues as they arise to ensure the project will be completed on time and to the satisfaction of OEMS.
- o *Emergency Medical Services Data System Implementation (02/2021 to 04/2022).* Danni served as the deputy project manager for the Office of Emergency Medical Services (OEMS) data system implementation project. The project involves the implementation of a new emergency patient care record and license management system. She monitors compliance with the vendor contract requirements and negotiates the workload for the understaffed OEMS. As part of vendor management, she mitigates risks and issues as they arise to ensure the project will be completed on time and to the satisfaction of OEMS.
- o *Children with Special Health Care Needs (CSHCN) (04/2020 to 01/2021)*
  The CSHCN project provided support for business process redesign and procedure manual completion for the program to align with national standards. Danni supports the CSHCN project with business analysis, process mapping (as-is and to-be), process redesign, procedure manual creation, and project coordination tasks.
- o *HIV and Hepatitis Process Redesign Project (03/2020 to 06/2020).*
  Danni supported this project with business analysis and project coordination tasks.
- o *Strategic Map Implementation Support & Performance Management and Quality Improvement Plan Development Project (2/2020 to present).*
  Danni supports this project with business analysis and project coordination tasks.
- o *Electronic Vital Records System (EVRS) Implementation (01/2020 to present).*
  This project supports the implementation of a new electronic vital records system for the State to migrate all historical data and move from an out-of-date, paper-based system to a simple web-based platform for internal and external users. Danni supports the EVRS Implementation project with business analysis and project coordination tasks including vendor facilitation, scheduling, and project support.
- o *Emergency Medical Services Data Procurement Support (01/2020 to 10/2020).*
  Danni supported the EMS Data project with business analysis and project coordination tasks.

- **West Virginia Department of Health and Human Resources (DHHR)** – *Child Welfare Initiatives Project Management Services (01/2020 to 04/2020).*
  Danni is responsible for project coordination for the Families First implementation support project.
- **West Virginia Bureau for Medical Services (BMS)**
  - *State Plan Review and Support (SPRS) Project (01/2020 to 04/2020).*
    This project included an end-to-end review of the State Plan, gap analysis, and creation of an up-to-date and compliant copy of the State Plan. Danni provided business analysis including compiling, reviewing, and analyzing sections of the State Plan. Danni also performed project coordination tasks such as scheduling and stakeholder engagement.
  - *Substance Use Disorder (SUD) Waiver Initiative Project (09/2019 to 02/2020).*
    Danni supported the SUD Waiver project with business analysis and management tasks.
  - *1915(c) Children with Serious Emotional Disturbance Waiver Development Project (11/2018 to 04/2020).*
    Danni supported the 1915(c) Waiver project with business analysis and management tasks.
  - *West Virginia Enterprise Project Management Office (EPMO) (11/2018 to 04/2020).*
    Danni supported the WV EPMO project with business analysis, project coordination, and management tasks.

Erica Hoffman, MS

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	3 years
Certifications and Education:	Bachelor's Board of Regents, West Virginia State University
	Master of Science in Sports Studies, West Virginia State University
	Prosci® Certified Change Management Practitioner
	PMI® Certified Associate in Project Management (CAPM)

Overview

Erica is an adept consultant with two decades of invaluable experience. She possesses a wealth of qualifications, including certifications as a Prosci® Certified Change Practitioner, and certification from the Project Management Institution (PMI) for CAPM ®. Her professional expertise extends to schedule management, event planning, delivering exceptional customer service, vendor facilitation, and comprehensive project support. A hallmark of Erica's approach is her unwavering commitment to forging collaborative partnerships with clients, a testament to her role as a trusted ally dedicated to facilitating knowledge transfer.

Experience

BerryDunn (06/2021 to present)

- *Women, Infants, and Children (WIC) Nutrition Program Product Management Office (PMO) (06/2021 to present).*
  The WIC PMO project provides product support and vendor facilitation for the maintenance and enhancement of the Crossroads system. The PMO provides support for the Crossroads User Group (XRUG) which includes West Virginia, Virginia, Alabama, and Rhode Island. Erica supports the WIC PMO project with vendor facilitation and project consultant for the XRUG.

- *West Virginia (WV), Bureau for Public Health (BPH) Assessments and Plans (07/2023 to present)*

  BerryDunn supports WV BPH with assessments and plans required by the Preventive Health and Health Services Block Grant (PHHSBG), Centers for Disease Control (CDC) Public Health Infrastructure Grant, CDC OT-2103 Health Disparities Grant, and CDC Enhancing Laboratory Capacity (ELC) Data Modernization Grant. The assessments include Community Status, Community Partners, and Community Context Assessments for the State Health Assessment; Job Satisfaction, Equity, Diversity, and Cultural Humility, Workforce Gap Analysis, and Public Health Competency Assessment for the Workforce Development Plan and Health Equity Plan. Erica contributes to facilitating the

timely fulfillment of these tasks in strict adherence to the stipulations outlined within the foundational contractual agreement between BerryDunn and the State of West Virginia.

- *Wyoming (WY) Department of Health (DOH) Public Health Division Performance Management and Quality Improvement (PMQI) and Strategic Map Implementation (07/2023 to present)*

   This project actively contributes to the implementation of PMQI Engagement Initiation and Ongoing Management, Needs Assessment, and Training Development and Delivery for WY DOH. The project encompasses the evaluation of baseline needs, the analysis of the needs assessment survey, formulation of queries for the baseline Performance Improvement and Health Equity (PIHE) Manager Interview Guide, and the compilation of key Technical Assistance (TTA) areas to be addressed. Subsequently, the project involves the development of a comprehensive PMQI TTA Plan, the creation of a PMQI toolbox serving as a valuable resource repository for future training initiatives, the adaptation, and crafting of agency Performance Management (PM) training materials, including associated evaluation mechanisms, as well as the customization of agency Quality Improvement (QI) training content. Erica plays a pivotal role in supporting the WY project through the meticulous documentation of project activities, proficiently managing schedules, crafting comprehensive meeting agendas, and diligently recording meeting minutes. In addition, Erica actively contributes her expertise by providing valuable knowledge and insights that are deemed necessary to ensure the successful execution of the project's objectives.

- *Electronic Vital Records System (EVRS) Implementation (06/2021 to 07/2023).*
   This project supported the implementation of a new electronic vital records system for the State of WV to migrate all historical data and move from an out-of-date, paper-based system to a simple web-based platform for internal and external users. Erica supported the EVRS Implementation project with project consultation and coordination of tasks including vendor facilitation, scheduling, process mapping, and project support.

- *Public Health Accreditation Project (06/2021 to 01/2023).*
   Erica supported the Public Health Accreditation Project with project coordination tasks including vendor facilitation, scheduling, and project support to assist in BPH's efforts to become accredited by the Public Health Accreditation Board (PHAB).

Mountaineer Montessori School (MMS) (07/2019 to 05/2021)

Erica assumed the responsibility of instructing Nutrition Science and Physical Education courses for students at MMS, concurrently serving as the dedicated fundraising coordinator. In her capacity as the fundraising coordinator, Erica not only successfully achieved the established objectives for the previous two years but also notably surpassed these targets by a significant margin.

Abundant Life Ministries (02/2010 to 07/2019)

In her role as Office Administrator, Erica assumed multifaceted responsibilities encompassing schedule coordination for various departments, proficient video editing, meticulous bookkeeping, and the timely disbursement of financial obligations. Additionally, she served as

the Registrar for Abundant Life Bible College, efficiently managing academic records and related administrative duties. Erica displayed a proactive commitment to community engagement, where she played a pivotal role in orchestrating and leading diverse outreach initiatives. These included the successful organization of community programs, such as food distribution programs, fairs, and educational initiatives designed to benefit the local community.

West Virginia Department of Education (01/2001 to 10/2006)

In her capacity as a Secretary, Erica undertook a comprehensive range of administrative duties, demonstrating exceptional organizational and communication skills. Her responsibilities included the coordination of meetings and conferences, efficient processing of travel reimbursements, and proficient management of incoming phone calls. Additionally, Erica displayed a strong commitment to client satisfaction by promptly addressing and directing client inquiries. She played an instrumental role in the creation and dissemination of documents intended for distribution to educational institutions, including West Virginia schools, superintendents, principals, and teachers, ensuring seamless communication and support within the educational community.

Melissa Chapusette, MHA

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Project Coordinator
Years of Experience Relevant to Proposed Role:	9 years
Certifications and Education:	Bachelor of Science in Public Health, West Chester University of Pennsylvania
	Master of Management in Healthcare Administration, Wilmington University
	Certified Release of Information Specialist 2017

Overview

Melissa is a strong project coordinator with experience across a wide range of state public health agency projects. She is particularly an expert with process mapping, policy and best practice research, drafting documents, and managing meeting materials.

Experience

BerryDunn (11/2021 to present). Melissa is a project coordinator supporting BerryDunn's Public Health Practice.

West Virginia Bureau for Public Health (BPH)

- *Women, Infants, and Children (WIC) Nutrition Program Product Management Office (PMO) (09/2023 to present).*
  The WIC PMO project provides product support and vendor facilitation for the maintenance and enhancement of the Crossroads system. The PMO provides support for the Crossroads User Group (XRUG) which includes West Virginia, Virginia, Alabama, and Rhode Island. Melissa provides meeting notes, drafts meeting agendas, manages scheduling, drafts project artifacts and deliverables, and tracks project action items, risks and issues, and adherence to contractual service-level agreements. Support development and delivery of project deliverables including state best practice research, process maps, and procedure guide.

- *West Virginia (WV), Bureau for Public Health (BPH) Assessments and Plans (07/2023 to present)*

  BerryDunn supports WV BPH with assessments and plans required by the Preventive Health and Health Services Block Grant (PHHSBG), Centers for Disease Control (CDC) Public Health Infrastructure Grant, CDC OT-2103 Health Disparities Grant, and CDC Enhancing Laboratory Capacity (ELC) Data Modernization Grant. The assessments include Community Status, Community Partners, and Community Context Assessments for the State Health Assessment; Job Satisfaction, Equity, Diversity, and Cultural Humility, Workforce Gap Analysis, and Public Health Competency Assessment for the Workforce Development Plan and Health Equity Plan. Melissa provides meeting notes,

drafts meeting agendas, manages scheduling, drafts project artifacts and deliverables, and tracks project action items, risks and issues, and adherence to contractual service-level agreements. Support development and delivery of project deliverables including state best practice research, process maps, and procedure guide.

- *Infant and Maternal Mortality Review Panel Monitor (04/2023 to present)*

Melissa provides meeting notes, drafts meeting agendas, manages scheduling, drafts project artifacts and deliverables, and tracks project action items, risks and issues, and adherence to contractual service-level agreements. Support development and delivery of project deliverables including state best practice research, process maps, and procedure guide.

- *Enhancing Laboratory Capacity Data Modernization (06/2022 to present)*

Melissa provides meeting notes, drafts meeting agendas, manages scheduling, drafts project artifacts and deliverables, and tracks project action items, risks and issues, and adherence to contractual service-level agreements.

- *Health Disparities Grant Management Support (05/2022 to present)*

Melissa provides meeting notes, drafts meeting agendas, manages scheduling, drafts project artifacts and deliverables, and tracks project action items, risks and issues, and adherence to contractual service-level agreements.

- *Emergency Medical Services Data System Implementation Project Management (11/2021 to 12/2022)*

Melissa provides meeting notes, drafts meeting agendas, manages scheduling, drafts project artifacts and deliverables, and tracks project action items, risks and issues, and adherence to contractual service-level agreements.

- *Accreditation Readiness Project (11/2021 to 12/2022)*

Melissa provides meeting notes, drafts meeting agendas, manages scheduling, drafts project artifacts and deliverables, and tracks project action items, risks and issues, and adherence to contractual service-level agreements.

- *Multi-Grant Project Management Office (11/2021 to 05/2022)*

Melissa supported four subprojects implementing federally funded initiatives on Data Modernization, Reopening Schools, Health Disparities, and the internal Fiscal Management Improvement Initiative. She provides meeting notes, drafts meeting agendas, manages scheduling, drafts project artifacts and deliverables, and tracks project action items, risks and issues, and adherence to contractual service-level agreements.

MacElree Harvey, Ltd. (10/2020 to 11/2021). Melissa worked as a record manager to operate and maintain the records management system, liaise with clients who request specific files, and handle the delivery of records. She conducted orientation and training for new hires regarding electronic document retrieval process and oversaw the storage and organization of document storage facilities. Melissa was responsible for the development and implementation of policies

and procedures and for the implementation, monitoring, and compliance of the Firms Records Management Policy.

MRO Corporation (07/2016 to 10/2020). Melissa worked as a Release of Information (ROI) Specialist to determine the release of records in accordance with HIPAA guidelines and obtain pertinent patient data from various sources, including electronic, off-site, or physical records that match patient request. She logged medical record requests, pulled and transferred information, and disseminated information to correct department, individual or outside location. Melissa resolved customer concerns and developed 6 years' experience with electronic medical records (EMR).

Medrisk Inc. (04/2015 to 06/2016). Melissa worked as a Clinical Advocate Support Professional to formulate and enact Service Center policies, procedures and quality assurance measures. She delegated work assignments to the department, created and provided templates for new hire trainees, and developed and implemented policies and procedures to improve department workflow. Melissa also trained new hires on the training manual and individualized templates. She developed familiarity with MedManager and MedVantage while performing administrative duties, customer service, and while working in accordance with the continued authorization process.

Diabetes Education Center of Pennsylvania Hospital (05/2014 to 09/2014). Melissa worked as an intern and Administrative Assistant to support the center. She built up knowledge in project management by actively participating in meetings and brainstorming sessions. She evaluated nursing notes to confirm accuracy of the described care provided and patient responses, and maintained strict patient privacy and confidential patient information, taking care to meet all HIPAA guidelines and statues for data security.

Caitlin Cabral

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Editor
Years of Experience Relevant to Proposed Role:	3 years
Certifications and Education:	Bachelor of Arts in Psychology, University of Hartford Poynter ACES Certificate in Editing

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, reports, and PowerPoint presentations for various government entities. This requires helping to ensure that documents conform to BerryDunn's formatting and writing standards. Caitlin also helps train new teammates and creates and presents educational materials to the Consulting Team. Caitlin is a Poynter ACES Certified Editor.

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.

Janine DiLorenzo

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Editor
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 (01/2022 to present). Janine is responsible for proofreading, copyediting, and formatting various types of documents, including proposals, reports, memos, presentations, and meeting notes.

Breakwater School (08/2019 to 08/2021). 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 (06/2011 to 06/2018).

- *Program Coordinator (06/2014 to 06/2018)*
  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 (08/2012 to 08/2013)*
  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 (06/2011 to 08/2011)*
  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 (08/2010 to 05/2011). 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.

KD Dobyne

Proposed Project Role	Project Management Support Staff
Role at BerryDunn:	Project Coordinator
Years of Experience Relevant to Proposed Role:	1 year
Certifications and Education:	Bachelor of Arts, Linguistics, University of Texas at Arlington

Overview

KD is an experienced project coordinator, bringing one year of administrative support and project assistance. She brings excellent time management skills and attention to detail that she applies to her project work.

Experience

BerryDunn (09/2023 to present)

KD serves as a project coordinator for BerryDunn's consulting teams, working with government and quasi-government clients.

Qualtek Wireless (08/2022 to 09/2023)

As a project coordinator, KD was responsible for responding to client needs to ensure successful receipt of project deliverables, including spreadsheets, PowerPoints, and closeout packages. She created and delivered purchase orders and also managed materials through Salesforce. She took responsibility for all administrative tasks and managed Verizon's SPM Tracker. KD also identified and communicated potential hurdles and areas for improvement within multiple project timelines.

University of Texas at Arlington (08/2018 to 05/2019)

As president of the Asian Student Association, KD managed multiple projects at once to plan and execute a successful year for the organization. She acted as the "face" of the organization by attending presidential roundtables and meeting with the President of the University to track progress and identify any issues. KD led and oversaw the planning and execution of fundraising and events, while staying on schedule and within the organization's budget.

Joliet Junior College (08/2016 to 05/2017)

KD worked as the admissions office assistant and led prospective students through the admissions process and provided exemplary customer service to meet admissions percentage goals. She completed data entry tasks, such as the entering of standardized testing scores, as well as the organization of student admission packets. KD supported senior admissions employees by completing office tasks such as printing, copying, and filing and also built rapport with potential students and parents by creating a welcoming admissions office environment and leading informational campus tours.

Carole Ann Guay

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Lead Project Coordinator
Years of Experience Relevant to Proposed Role:	14 years
Certifications and Education:	Currently working towards Bachelor of Science 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.

Experience
BerryDunn (10/2014 to present). Carole Ann serves as a project coordinator with additional administrative duties. Selected project work includes:

- **Puerto Rico** – *Enterprise Objective Monitoring and Control (09/2023 to present).* Carole Ann assists with review and updates of deliverables.

- **Ellis County, TX** – *Computer-Aided Dispatch and Records Management System (CAD/RMS) and Jail Management System (JMS) Replacement (06/2021 to present).* Carole Ann coordinates document request items, status reports, meeting requests, and data management and has been involved in all phases of the project.

- **City of Saint Charles, MO** – *Enterprise Resource Planning (ERP) System Selection Project (09/13/2023 to 10/06/2023).* Carole Ann assisted in the analysis of vendor proposals and requirements analysis to assist in vendor selection.

- **Metropolitan Government of Nashville and Davidson County (Metro), TN** – *Information Security Program Development (05/2016 to present).* For Metro's, development of their Information Security Management Program, Carole Ann worked as a project coordinator, assisting in the development of findings reports. In addition, she served as part of the team performing a Payment Card Industry (PCI) Readiness Assessment. These activities included identifying Metro's current state of PCI, identifying where PCI data resides and where it traverses the network.

- **Vermont Department of Vermont Health Access** – *Vermont Health Connect Financial and Programmatic Audit (01/2016 to present).* BerryDunn has performed the State's financial and programmatic audit of its Health Insurance Exchange for FYE 6/16 and is in the process of performing the FYE 6/17 audit. Carole Ann currently serves as the project coordinator on this audit to determine whether the exchange is in material compliance with 45 CFR 155.

- **Minnesota Health Benefit Exchange (MNsure)** – *Programmatic Audit (10/2015 to present).*

BerryDunn is performing the programmatic audit for the State's health insurance exchange. Carole Ann is the project coordinator for BerryDunn's audit team assessing whether MNsure's program is compliant with all federal requirements.

- **Sacramento Municipal Utility District (SMUD)** – *Information Security Audit (08/2016 to 12/2017).*
  Carole Ann provided documentation support and deliverable assistance for SMUD's Information Security Audit.

- **West Virginia Department of Health and Human Resources (DHHR)** – *Eligibility and Enrollment Independent Security and Privacy Controls Assessment (01/2017 to 07/2017).*
  Carole Ann served as an analyst for West Virginia Eligibility and Enrollment (E&E) Independent Security and Privacy Assessment project. The independent assessment was completed against the CMS MARS-E v2.0 framework.

- **Massachusetts State Ethics Commission** – *CMS Planning and Implementation Services (04/2017 to 06/2017).*
  Carole Ann provided deliverable support, as well as data gathering and organization for this project. She also participated in on-site fact-finding meetings.

- **Washington State Auditor's Office (SAO)** – *Local Government IT Security Audits (11/2014 to 06/2017).*
  Carole Ann served as a technical analyst assisting in the performance of information security audits for various municipalities throughout the State of Washington, sponsored by the SAO, conducting assessment activities and analysis of current environments. The team assisted in identifying threats, vulnerabilities, and risks, in addition to providing recommendations for remediation.

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

Megan Hamilton

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Editor
Years of Experience Relevant to Proposed Role:	10 years
Certifications and Education:	Bachelor of Arts in English, Kent State University
	Master of Arts in Literary and Cultural Studies, Carnegie Mellon University
	Poynter ACES Certificate in Editing

Overview

Megan is an experienced editor with experience in corporate, research, and academic settings. She has a strong understanding of various citation styles as well as technical, journalistic, and academic editing.

Experience

BerryDunn (12/2022 to present). Megan will be working with the BerryDunn team in West Virginia to provide documentation support.

Fiverr (05/2022 to 12/2022). Megan served as a Freelance Editor and Proofreader on professional documents for clients.

Institute of Reading Development (05/2021 to 08/2021; 05/2022 to 12/2022). Megan served as a teacher responsible for instructing reading and writing for students in kindergarten through college. She organized and conducted meetings with parents regarding reading assessments and progress.

Carnegie Mellon University (08/2021 to 05/2022). Megan served as a Research Assistant to gather and articulate research findings for a range of academic projects.

Brainchild Literary Magazine (08/2020 to 05/2021). Megan served as Editor in Chief to lead the process of soliciting poetry and prose submissions. She collaborated with staff to select and edit submissions and led discussions with staff about goals of publication and establishing a social media presence.

Academic Success Center (08/2018 to 05/2021). Megan served as a tutor and as Program Assistant to facilitate team meetings, assist with new tutor observations, and evaluate study materials. She assisted professors with navigating student technology and academic material.

Seglian Manufacturing Group (01/2012 to 01/2022 [seasonal]). Megan served as an administrative assistant, directly under Finance Director, to edit and update pertinent documents for ISO auditing and company records. She created Excel report to support General Ledger and maintained company records and documents to meet tax guidelines.

Emily Hendrickson

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Editor
Years of Experience Relevant to Proposed Role:	10 years
Certifications and Education:	Bachelor of Arts in English Literature and Language, Gordon College
	Bachelor of Arts in Biblical and Theological Studies, Gordon College
	Poynter ACES Certified Editor

Overview

Emily is a published author and expert copywriter and editor with extensive experience reviewing business writing, catalog copy, and fiction and nonfiction manuscripts. She specializes in document quality assurance and editorial duties, working with clients across BerryDunn's areas of focus, including local government entities, higher education institutions, and state agencies.

Experience

BerryDunn (07/2017 to 06/2021, full-time; 06/2021 to present, per diem). Emily provides editorial and quality reviews of client deliverables such as IT strategic plans, feasibility studies, and assessment reports for the government consulting group. She supports BerryDunn consultants, offering content revision suggestions and ensuring that quality, style, and branding standards are met for all deliverables. She has developed and delivered numerous writing presentations focusing on best practices and addressing common business writing challenges.

Christianbook (06/2021 to present). As editor for the catalog copy department, Emily assigns and oversees writing for 12+ catalogs, and edits all advertising copy produced, revising content as needed for powerful sales messaging and target audiences. She also reviews catalogs throughout development stages, checking for internal consistency, accuracy, and incorporation of all reviewer comments. She was responsible for overhauling the department Style Guide and created training materials and process flows for new hires. To inspire creativity and continuously improve the copywriters' skills, she designs and presents monthly sessions to dissect elements of exceptional writing, highlight best practices, and address common errors.

Rose Publishing/Tyndale House (02/2021 to 12/2021). As freelance editor, Emily provided content edits for nonfiction books, performing line edits and developmental edits to improve structure, flow, and readability. She regularly rewrote significant content for tone, clarity, and structure and performed information-gathering to revamp text and fact-check quoted material.

Martin's Point Health Care (04/2016 to 07/2017). As a patient services representative, Emily was responsible for queue management, including 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.

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 workflow. She performed quality review of documents after scanning to confirm completeness of the electronic file.

Seacoast Christian School (09/2014 to 06/2015). Emily taught English and Creative Writing, adapted lesson plans to achieve short- and long-term educational objectives, and demonstrated classroom management skills while inspiring students to succeed.

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; printing and assembling reports; and maintaining paper and electronic filing. She was also responsible for graphic design work.

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

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Alycia Minshall

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Editor
Years of Experience Relevant to Proposed Role:	14 years
Certifications and Education:	Bachelor of Arts in English, Alma College
	Master of Arts in English Language and Literature, Central Michigan University
	Poynter ACES Certificate in Editing

Overview

Alycia Minshall is an editing and communications professional with more than 14 years of experience in higher education and corporate settings. She excels in copywriting, editing, and collaborating on deliverables.

Experience

BerryDunn (8/2022 to present). Alycia will be working with the BerryDunn team in West Virginia to provide documentation support. Alycia provides copyediting, proofreading, and formatting services for BerryDunn deliverables.

Alycia Minshall Editing Services (3/2014 to present). Alycia provides editing services to clients across a variety of assignments, including poetry books, master's theses, and doctoral dissertations. She fact-checks, copyedits, and proofreads documents, helping to ensure a well-written final product. Past clients include Public Sector Consultants, Michigan Saves, and MedHealth.

Public Sector Consultants (4/2017 to 8/2021)

- *Senior Editor (6/2020 to 8/2021)*
  As senior editor, Alycia wrote copy for various mediums, including websites, social media, landing pages, and event collateral. She copyedited, proofread, and fact-checked marketing collateral; web copy; press releases; research reports; financial, legal, and technical documents; presentations; social media copy; proposals and requests for proposals; case studies; meeting notes; and more. She helped to ensure consistency in voice, brand, and tone across messaging channels, as well as helping to ensure that all materials are well written, accurate, properly researched, objective, concise, and focused. She managed a team of editors, providing guidance on improving speed and accuracy as well as continuing education. She also maintained the company style guide, updating the document annually to help ensure proper terminology and appropriate treatment of diversity, equity, and inclusion principles.

- *Editor (4/2017 to 6/2020).* As an editor Alycia copyedited, proofread, and fact-checked marketing collateral; web copy; press releases; research reports; financial, legal, and technical documents; presentations; social media copy; proposals and requests for proposals; case studies; and meeting notes. She helped to ensure that all materials are

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well written, accurate, properly researched, objective, concise, and focused, as well as helping to ensure consistency in voice, brand, and tone across messaging channels.

University of Southern California Graduate School of Social Work (9/2015 to 6/2016). Alycia served as Learning Support Writing Coach, working collaboratively with graduate students on a variety of writing topics and assignments, including research papers, theses, and dissertations. She taught biweekly seminars on mastering APA style, writing with clarity, conducting research, and organizing writing assignments.

Central Michigan University Writing Center (8/2013 to 6/2014). Alycia served as the Writing Across the Curriculum Coordinator to develop and schedule more than 100 writing center orientations, writing workshops, and presentations across campus; topics covered included APA style, business writing, and peer-review techniques. She trained writing center staff on delivering workshop and orientation materials, and she maintained a database of record for writing center presentations, including data on number of attendees, date of presentation, and lead presenter.

Central Michigan University (1/2012 to 6/2014). Alycia served as a graduate assistant to collaborate with students, staff, and faculty on writing assignments to improve clarity and organization. She conducted more than 1,000 writing sessions for undergraduates, graduates, and faculty, and served as lead consultant for ESL students, providing culturally sensitive, tailored sessions for their specific needs.

Alma College Writing Center (8/2008 to 12/2011)

- *Student Director (8/2010 to 12/2011)*
  Alycia supervised and managed seven employees, worked closely with the faculty director to properly staff the center and manage campus presentations, and conducted monthly staff meetings. She created weekly work schedules for staff, scheduled and delivered writing center orientations, and managed monthly payroll submissions.

- *Writing Center Tutor (8/2008 to 12/2011).*
  Alycia tutored and collaborated with undergraduate students on class assignments, resumes, and graduate school application essays to improve their writing. She also delivered writing center orientations across campus.

Jordan Ramsey, MA

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Senior Editor
Years of Experience Relevant to Proposed Role:	14 years
Certifications and Education:	Bachelor of Arts in Liberal Arts and Sciences, English Literature and Creative Writing, University of Illinois at Urbana-Champaign
	Master of Arts in English: Professional Writing, Southeast Missouri State University
	Lean Six Sigma Green Belt Certification
	Poynter ACES Certified Editor

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.

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. He also led an effort for the entire Consulting Team (approximately 350 people at the time) to install and utilize the PerfectIt software, an application that checks for consistency in documents.

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.

Jonathan Williams

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Staff Editor
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	Bachelor of Arts in English, Bowling Green State University

Overview

Jon is an experienced writer and editor, bringing more than 20 years of experience in proofreading, copyediting, and professional writing across several industries. He works with BerryDunn's consulting teams to review and revise written documentation before being submitted to clients.

Experience

BerryDunn (02/2019 to present). Jon serves as an editor for BerryDunn's Consulting Team, 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 Copyeditor (11/2010 to present). Jon has worked with Ertel Publishing to proofread several niche magazines, as well as with Gypsy Publications to copyedit 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 (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. He scheduled 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 spelling, and wrote copy for planting guides included with shipments.

7.0 Deliverable and Artifact Dictionaries

Table 5: Deliverable Dictionary

Deliverable #	Deliverable Name	Deliverable Description
01	XRUG Annual Report	• Assessment process to gather feedback from XRUG, including identifying participants, creating questions related to satisfaction with processes, and validating these with ESC • Execute the assessment process and document all results • Brief the XRUG and other interested SAs on the state of the XRUG and the Crossroads System at the Annual Meeting Deliver a status report to the ESC based on discussion at the Annual Meeting detailing action plans to track progress

02	Annual M&E APD Submissions	BerryDunn will implement the APD process for the XRUG and coordinate activities regarding the APD inputs and requirements. We will facilitate the decision-making process and develop and update the following APDs:
		    a. M&E APD
		    b. PMO APD

03	Updated XRUG Charter, CCP Documentation, and Communications Plan	BerryDunn will maintain and provide updates to XRUG documents. • XRUG Charter • CCP documentation • Communications Plan
04	Transition-Out Plan	BerryDunn will execute the Transition-Out Plan by providing transition support to the incoming PMO contractor to ensure uninterrupted service support to the XRUG and member SAs for 30 business days prior to the end of the contract.

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Table 6: Artifact Dictionary

Artifact #	Artifact Name	Artifact Description
01	XRUG Annual PMP and Project Work Plan/Schedule Revisions/Updates	Outlines how the project will be managed, executed, and controlled. The PMP will be designed to be referred to regularly and used as a tool to help the team achieve a successful outcome. The PMP will include details relating to management of project processes—in alignment with Project Management Institute (PMI) standards and the Project Management Body of Knowledge (PMBOK). The Workplan/Schedule provides the tasks, timelines, dependencies, task owners, and high-level milestones for the project. It is expected that the work plan/schedule will be progressively elaborated upon as the project progresses, i.e., detailed tasks and sub-tasks will be added and/or updated as new information is gathered and decisions are made.
02	Risk and Issue Log	BerryDunn's team will manage the risk and issue-tracking process using an Issue Log per the agreed-upon processes in the Product Management Plan. • Ensuring known issues, enhancement requests, etc., with the Crossroads system are captured, documented, and tracked through resolution • Providing information to interested parties regarding status, workarounds, resources, risks, etc., relating to documented issues • Providing basic guidance regarding the issue-tracking process for SA documentation Monthly PMO Status Reports to the ESC that contain updates on PMO and XRUG accomplishments and activities during the reporting period; PMO and XRUG planned activities for the following reporting period; key decisions, risks, and issues; and product schedules.
03	Action Item and Decision Logs	Inclusive of the item discussed, the decision made regarding how to address the item, the date the decision was made, and who made the decision—within three business days of the meeting. In addition, in accordance with the agreed-upon decision management processes in the Product Management Plan we will maintain a consolidated decision log on the M&E collaboration site.
04	Weekly and Monthly Project Status Reports	Monthly PMO Status Reports to the ESC that contain updates on PMO and XRUG accomplishments and activities during the reporting period; PMO and XRUG planned activities for the following reporting period; key

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Artifact #	Artifact Name	Artifact Description
		decisions, risks, and issues; and product schedules. Weekly reports will be provided to the Project Sponsor.
05	Defect Log	BerryDunn's team will manage the issue-tracking process using a Defect Log per the agreed-upon processes in the Product Management Plan. • Ensuring known defects, issues, bugs, etc., with the Crossroads system are captured, documented, and tracked through resolution • Providing information to interested parties regarding status, workarounds, resources, risks, etc., relating to documented issues • Providing basic guidance regarding the defect-tracking process for SA documentation
06	Change Request Log	BerryDunn's team will manage the change request-tracking process using a Change Request Log per the agreed-upon processes in the Product Management Plan. • Ensuring enhancements and change requests for the Crossroads system are captured, documented, and tracked through deployment • Cost and release logs
07	Quarterly M&E Vendor Assessments	Summary of vendor accomplishments, barriers, service level agreement adherence, etc.
08	Annual Meeting Materials	BerryDunn will prepare and distribute agendas, meeting notes, and presentations for the Annual Meeting.
09	Standing and Ad Hoc Meeting Agendas and Notes	BerryDunn will prepare and distribute agendas via email for each meeting by noon of the business day before the scheduled meeting. We will prepare and distribute approved meeting notes via email for review to appropriate staff within two business days of each meeting's completion. We will update notes within three business days of receiving feedback from SA staff.
10	Project Completion Summary and Closeout Meeting	BerryDunn will prepare and submit a Project Completion Summary to document the work performed related to this SOW and provide the disposition of deliverables, action items, risks, issues, etc. We will conduct a project closeout meeting with key project interested parties to review the summary and capture lessons learned.

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8.0 Overview of Roles

Table 6, below, provides a description of the BerryDunn resources and their roles.

Table 6. BerryDunn Resources and Roles

Name/ Role	Responsibilities
Contract Manager Nicole Becnel, PMP	As the contract manager, Nicole will have overall responsibility for BerryDunn's contract. She will serve as point of contact for all contractual issues. She will be available to meet with the State project sponsor(s) and XRUG ESC if requested in order to address any contractual concerns.
Project Principal Charlie Leadbetter, PMP	In the role of project principal Charlie will oversee the work performed by BerryDunn's PMO team and provide strategic direction to the engagement and product managers. He will partner with the contract manager and co-product managers to ensure the full commitment of BerryDunn to this engagement. He will be responsible for invoicing the State for PMO resources. He will be available to meet with the State project sponsor(s) and XRUG ESC regarding the project status or any other issues critical to the success of the project.
Engagement Manager Julie Sullivan, PMP	In the role of engagement manager Julie will oversee the project team and serve as an escalation point for the State project sponsor(s). She will assure quality deliverables, client satisfaction, and assist in the mitigation of risks and issues. Julie will serve as a liaison between the product managers and the project principal and contract manager. She will also help ensure that the project schedule is being adhered to and the product management plan and project work plan are being followed.
Co-Product Managers Danni Ricks Erica Hoffman	The co-product managers (Co-PM) will have responsibility for overseeing the work of the team, managing all day-to-day activities, monitoring progress against the agreed-upon PMP and schedule, contributing to and reviewing all BerryDunn deliverables prior to their submission to the ESC, and communicating project status to BerryDunn's project principal. The Co-PMs will serve as the primary point of contact for the XRUG. They will maintain the project work plan and schedule; facilitate meetings; lead fact-finding activities; and present critical project information to the ESC and XRUG as a whole.
PMO Project Coordinator Melissa Payne	The PMO project coordinator will provide support to the product manager, the ESC, and other project team members. The PMO Coordinator will draft deliverables, capture meeting notes, and provide general support to the team as required. The PMO BA will also be responsible for scheduling XRUG meetings; coordinating agendas; taking and circulating meeting notes; consolidating information produced through the project team into organized documentation in the form of product management artifacts (e.g., project charter, project status report, product management plan components, meeting minutes) but may also include supporting other functional areas of the project.

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Name/ Role	Responsibilities
Editing/QA	The role of Editing/QA in the project is to ensure that deliverables and other documents are of the highest quality in terms of grammar, format, standardization, etc.

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9.0 Federal Procurement Clauses

USDA

United States Department of Agriculture

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A11. Federal Procurement Clauses

A11.1 Equal Employment Opportunity

Except as otherwise provided under 41 CFR Part 60, all contracts that meet the definition of federally assisted construction contract in 41 CFR Part 60-1.3 must include the equal opportunity clause provided under 41 CFR 60-1.4(b), in accordance with Executive Order 11246, "Equal Employment Opportunity" (30 FR 12319, 12935, 3 CFR Part, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and implementing regulations at 41 CFR part 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor." (2 CFR 200, Subpart F, Appendix II)

The EEO clause must be included or the State must have its own EEO similar clause.
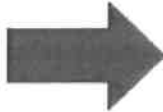
See the Deparment of Labor Executive Order 11246 – Equal Employment Opportunity for more information.

A11.2 Clean Air and Federal Water Pollution Control Act

Clean Air Act (42 U.S.C. 7401-7671q.) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387), as amended. Contracts and subgrants of amounts in excess of $150,000 must contain a provision that requires the non-Federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA). (2 CFR 200, Subpart F, Appendix II)

A11.3 Anti-Lobbying Act

This Act prohibits the recipients of Federal contracts, grants, and loans from using appropriated funds for lobbying the Executive or Legislative branches of the Federal government in connection with a specific contract, grant, or loan. As required by Section 1352, Title 31 of the U.S. Code and implemented at 2 CFR 200, Subpart F, Appendix II, for persons entering into a grant or cooperative agreement over $100,000, as defined at 31 U.S.C. 1352, the applicant certifies that:

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a. No federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with the making of any federal grant, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any federal grant or cooperative agreement;

b. If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with this federal grantor o cooperative agreement, the undersigned shall complete and submit Standard Form – LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions;

c. The undersigned shall require that the language of this certification be include in the award documents for all sub-awards at all tiers (including sub-grants, contracts under grants and cooperative agreements, and subcontracts) and that all sub-recipients shall certify and disclose accordingly.

A11.4   Americans with Disabilities Act
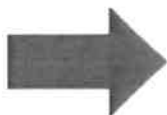
See the Americans with Disabilities Act website for more information.

This Act (28 CFR Part 35, Title II, Subtitle A) prohibits discrimination on the basis of disability in all services, programs, and activities provided to the public and State and local governments, except public transportation services.

A11.5   Drug-Free Workplace Statement

The Federal government implemented 41 U.S. Code § 8103, Drug-free workplace requirements for Federal grant recipients in an attempt to address the problems of drug abuse on the job. It is a fact that employees who use drugs have less productivity, a lower quality of work, and a higher absenteeism, and are more likely to misappropriate funds or services. From this perspective, the drug abuser may endanger other employees, the public at large, or themselves. Damage to property, whether owned by this entity or not, could result from drug abuse on the job. All these actions might undermine public confidence in the services this entity provides.

b) BerryDunn

Therefore, in order to remain a responsible source for government contracts, the following guidelines have been adopted:

1. The unlawful manufacture, distribution, dispensation, possession or use of a controlled substance is prohibited in the work place.

2. Violators may be terminated or requested to seek counseling from an approved rehabilitation service.

3. Employees must notify their employer of any conviction of a criminal drug statue no later than five days after such conviction.

4. Contractors of federal agencies are required to certify that they will provide drug-free workplaces for their employees.

Transactions subject to the suspension/debarment rules (covered transactions) include grants, subgrants, cooperative agreements, and prime contracts under such awards. Subcontracts are not included.

A11.6 Royalty Free Rights to Use Software or Documentation Developed

2 CFR 200.315 Intangible property.

(a) Title to intangible property (see §200.59 Intangible property) acquired under a Federal award vests upon acquisition in the non-Federal entity. The non-Federal entity must use that property for the originally-authorized purpose, and must not encumber the property without approval of the Federal awarding agency. When no longer needed for the originally authorized purpose, disposition of the intangible property must occur in accordance with the provisions in §200.313 Equipment paragraph (e).

(b) The non-Federal entity may copyright any work that is subject to copyright and was developed, or for which ownership was acquired, under a Federal award. The Federal awarding agency reserves a royalty-free, nonexclusive and irrevocable right to reproduce, publish, or otherwise use the work for Federal purposes, and to authorize others to do so.

(c) The non-Federal entity is subject to applicable regulations governing patents and inventions, including government wide regulations issued by the Department of Commerce at 37 CFR Part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Awards, Contracts and Cooperative Agreements."

(d) The Federal Government has the right to:

(1) Obtain, reproduce, publish, or otherwise use the data produced under a Federal award; and

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United States Department of Agriculture

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(2) Authorize others to receive, reproduce, publish, or otherwise use such data for Federal purposes.

A11.7   Debarment and Suspension

Debarment and Suspension (Executive Orders 12549 and 12689)—A contract award (see 2 CFR 180.220) must not be made to parties listed on the government wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR part 1986 Comp., p. 189) and 12689 (3 CFR part 1989 Comp., p. 235), "Debarment and Suspension." SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549. (2 CFR 200, Subpart F, Appendix II)

States to include in RFP and Contract a statement of certification by the vendor, such as "By signing this contract, the vendor certifies it is not suspended or debarred as specified by these rules."

◯ Any Words (i)

◯ All Words (i)

◯ Exact Phrase (i)

e.g. 123456789, Smith Corp

"BERRY, DUNN, MCNEIL & PARKER, LLC"   ×

Classification   ⌄

Excluded Individual   ⌄

Excluded Entity   ⌄

Federal Organizations   ⌄

Exclusion Type   ⌄

Exclusion Program   ⌄

Location   ⌄

Dates   ⌄

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BERRY, DUNN, MCNEIL & PARKER, LLC

Organization Information

Org Type	Effective Date	Established Date	Filing Date	Charter	Class	Sec Type	Termination Date	Termination Reason
LLC | Limited Liability Company	1/8/2008		1/8/2008	Foreign	Profit			

Organization Information

Business Purpose	5416 - Professional, Scientific and Techincal Servies - Professional, Scientific and Techincal Servies - Management, Scientific and Tech Consulting Services (administrative, general, HR, marketing, process, physical distribution, logistics, environmental)	Capital Stock	
Charter County	Kanawha	Control Number	0
Charter State	ME	Excess Acres	
At Will Term	A	Member Managed	MBR
At Will Term Years		Par Value	

Authorized Shares	Young Entrepreneur	Not Specified

Addresses

Type	Address
Designated Office Address	209 WEST WASHINGTON STREET CHARLESTON, WV, 25302
Mailing Address	2211 CONGRESS STREET PORTLAND, ME, 04102 USA
Notice of Process Address	CORPORATION SERVICE COMPANY 209 WEST WASHINGTON STREET CHARLESTON, WV, 25302
Principal Office Address	2211 CONGRESS STREET PORTLAND, ME, 04102 USA
Type	Address

Officers

Type	Name/Address
Member	CHARLES K. LEADBETTER III 2211 CONGRESS STREET PORTLAND, ME, 04102
Member	DAVID A. ERB, C.P.A. 2211 CONGRESS STREET PORTLAND, ME, 04102
Member	KATHY PARKER, C.P.A. 2211 CONGRESS STREET PORTLAND, ME, 04102
Member	SARAH BELLIVEAU, C.P.A. 2211 CONGRESS STREET PORTLAND, ME, 04102
Type	Name/Address

DBA

DBA Name	Description	Effective Date	Terminatio
BERRY DUNN	TRADENAME	3/21/2011	

DBA Name	Description	Effective Date	Termination Date
BERRY, DUNN, MCNEIL & PARKER, PLLC	TRADENAME	11/5/2019	

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Monday, June 3, 2024 — 5:08 PM

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