



Department of Administration
Purchasing Division
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

State of West Virginia Delivery Order

Order Date: 05-20-2024

CORRECT ORDER NUMBER MUST APPEAR
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SHIPPING PAPERS. QUESTIONS
CONCERNING THIS ORDER SHOULD BE
DIRECTED TO THE DEPARTMENT
CONTACT.

Order Number:	CDO 0511 2680 BMS2400000040 1	Procurement Folder:	1420386
Document Name:	Technical Assistance and Program Support (TAPS) Phase VI Pro	Reason for Modification:	
Document Description:	Technical Assistance and Program Support (TAPS) Phase VI Pro		
Procurement Type:	Central Delivery Order		
Buyer Name:	Crystal G Hustead		
Telephone:	(304) 558-2402		
Email:	crystal.g.hustead@wv.gov		
Shipping Method:	Best Way	Master Agreement Number:	CMA 0511 HHR2100000003 1
Free on Board:	FOB Dest, Freight Prepaid		

VENDOR	DEPARTMENT CONTACT																				
Vendor Customer Code: 000000100150 BERRY DUNN MCNEIL & PARKER LLC 2211 CONGRESS ST PORTLAND ME 04102 US Vendor Contact Phone: 6813138905 Extension: Discount Details: <table><thead><tr><th></th><th>Discount Allowed</th><th>Discount Percentage</th><th>Discount Days</th></tr></thead><tbody><tr><td>#1</td><td>No</td><td>0.0000</td><td>0</td></tr><tr><td>#2</td><td>No</td><td></td><td></td></tr><tr><td>#3</td><td>No</td><td></td><td></td></tr><tr><td>#4</td><td>No</td><td></td><td></td></tr></tbody></table>		Discount Allowed	Discount Percentage	Discount Days	#1	No	0.0000	0	#2	No			#3	No			#4	No			Requestor Name: Lakendra R Burdette Requestor Phone: 304-352-4319 Requestor Email: lakendra.burdette@wv.gov 24 FILE LOCATION _____
	Discount Allowed	Discount Percentage	Discount Days																		
#1	No	0.0000	0																		
#2	No																				
#3	No																				
#4	No																				

INVOICE TO	SHIP TO
PROCUREMENT OFFICER: 304-352-4286 HEALTH AND HUMAN RESOURCES BUREAU FOR MEDICAL SERVICES 350 CAPITOL ST, RM 251 CHARLESTON WV 25301-3709 US	PROCUREMENT OFFICER: 304-352-4286 HEALTH AND HUMAN RESOURCES BUREAU FOR MEDICAL SERVICES 350 CAPITOL ST, RM 251 CHARLESTON WV 25301-3709 US

Total Order Amount: \$1,498,800.00

Purchasing Division's File Copy

CH 6/3/24
PURCHASING DIVISION AUTHORIZATION
DATE: 6/4/24
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION
DATE: 6-5-24
ELECTRONIC SIGNATURE ON FILE

Extended Description:

Technical Assistance and Program Support (TAPS) Phase VI Project

Dates of Service: 06/15/2024 - 06/14/2025

Total: \$1,498,800.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$77,400.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2024-06-15	2025-06-14				

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

Lead Project Manager: Optional Renewal Year One

Hourly Rate: \$215.00

Nicole Becnel 360 hours @ \$215 = \$77,400.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$15,660.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2024-06-15	2025-06-14				

Commodity Line Description: Engagement Manager: Optional Renewal Year One**Extended Description:**

Engagement Manager: Optional Year One

Hourly Rate: \$270.00

Eduardo Daranyi 58 hours @ \$270 = \$15,660.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$1,101,420.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2024-06-15	2025-06-14			2024-04-24	

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

Extended Description:

General Project Manager: Optional Renewal Year One

Hourly Rate: \$180.00

Susan Chugha 350 hours @ \$180 = \$63,000
Peter Alfrey 350 hours @ \$180 = \$63,000
Maggie Anderson 338 hours @ \$180 = \$60,840
Julie Bandy 338 hours @ \$180 = \$60,840
Julie DuPuis 338 hours @ \$180 = \$60,840
Valerie Hamilton 338 hours @ \$180 = \$60,840
Marie LaPres 349 hours @ \$180 = \$62,820
Brody McClellan 338 hours @ \$180 = \$60,840
Emily McCoy 338 hours @ \$180 = \$60,840
Kitty Purington 338 hours @ \$180 = \$60,840
Sarah Renner 338 hours @ \$180 = \$60,840
Meghann Slaven 338 hours @ \$180 = \$60,840
Nicole Spears 338 hours @ \$180 = \$60,840
Ethan Wiley 338 hours @ \$180 = \$60,840
Liz Vose 338 hours @ \$180 = \$60,840
Dawn Webb 338 hours @ \$180 = \$60,840
Ryan Wrisley 338 hours @ \$180 = \$60,840
Dot Ball 338 hours @ \$180 = \$60,840

Total: 6,119 hours @ \$180 = \$1,101,420.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$304,320.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2024-06-15	2025-06-14				

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

Alex Glowacky 314 hours @ \$80 = \$25,120
Shandia Benke 26 hours @ \$80 = \$2,080
Krista Clay 520 hours @ \$80 = \$41,600
Hailey Holden 65 hours @ \$80 = \$5,200
Azba Hotelwala 520 hours @ \$80 = \$41,600
Kortney Kirk 26 hours @ \$80 = \$2,080
Katie McDonald 65 hours @ \$80 = \$5,200
Megan Blount 520 hours @ \$80 = \$41,600
Cate Poling 26 hours @ \$80 = \$2,080
Alex Stern 520 hours @ \$80 = \$41,600
Sophie Torborg 500 hours @ \$80 = \$40,000
Alycia Minshall, Caitlin Cabral, Carole Ann Guay, Emily Hendrickson, Janine DiLorenzo, Jon Williams, Jordan Ramsey, Megan Hamilton, KD Dobyne 720 hours @ \$80 = \$56,160

Total: 3,804 hours @ \$80 = \$304,320.00



April 19, 2024

To Whom It May Concern:

BerryDunn submitted a Staffing Plan and Scope of Work (SOW) document to assist the West Virginia Department of Human Services (DoHS) Bureau for Medical Services (BMS) by providing support for the Technical Assistance and Program Support (TAPS) Phase VI Project under our master contract (CMA # HHR21*03). As stated in the SOW document, the duration of this work is estimated to be 13 months. BerryDunn agrees to a SOW start date effective June 15, 2024.

Assuming a start date of June 15, 2024, the work would then conclude on June 14, 2025.

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

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

Best Regards,

DocuSigned by:

2DAAA44ADB3A477
Peter Alfrey
Principal
207-541-2242

Ok


West Virginia Department of Human Services Bureau for Medical Services

Technical Assistance and Program Support (TAPS) Phase VI Project

Staffing Plan and Scope of Work

Prepared for Centralized Master Agreement (CMA) #HHR21*03

Submitted by:

BerryDunn
300 Capital Street
Charleston, WV 25301
681-313-8905

Nicole Becnel, PMP®, Principal
nbecnel@berrydunn.com

Peter Alfrey, PMP®, Principal
palfrey@berrydunn.com

Submitted On:

April 19, 2024

Staffing Plan and Scope of Work (SOW) for the West Virginia (State) Department of Human Services (DoHS) Bureau for Medical Services (BMS) Technical Assistance and Program Support (TAPS) Phase VI Project

This scope of work (SOW) describes the tasks BerryDunn will perform to assist the West Virginia (State) Department of Human Services (DoHS) and Bureau for Medical Services (BMS). The work completed under TAPS VI Project will be completed in accordance with the terms and conditions of the Centralized Master Agreement (CMA) Number HHR21*03 BMS Project Management Services contract between BerryDunn and the State DoHS.

1.0 Introduction

The intent of this document is to help ensure common expectations for deliverables and services BerryDunn will provide under this Staffing Plan and SOW. BerryDunn considered the following information in preparing this SOW.

1.1 Key Information

The BMS requested BerryDunn's assistance to provide ongoing project management services and subject matter expertise. These services will continue to support the TAPS project's goal of providing project management, subject matter expertise, and program support.

The TAPS VI Project is expected to continue supporting BMS in achieving Medicaid Information Technology Architecture (MITA) alignment goals in the following areas:

- Gen 1.0 – Improve the State's effectiveness and efficiency
- Gen 4.0 – Assess, implement, and monitor compliance with all relevant federal laws and regulations
- PL 1.0 - Enhance the DoHS's ability to analyze the effectiveness of potential and existing benefits and policies
- PL 2.0 - Improve consistency of Plan Management processes and effective communication of policy
- Conditions and Standards – Business Results Condition, Industry Standards Condition, Interoperability Condition, Leverage Condition, Modulatory Standard

1.2 Assumptions

Estimates for this SOW are based on the following assumptions:

- BMS Commissioner Cynthia Beane will serve as project sponsor. Commissioner Beane or her designee will sign off on deliverables.
- Deputy Commissioner Sarah Young will serve as the primary State point of contact for the project.
- This work is projected to be completed within 13 months of project initiation.

-
- The BerryDunn leadership team will consist of Eduardo Daranyi, Peter Alfrey, and Ethan Wiley who will provide engagement, contract, and portfolio oversight, as well as Susan Chugha as program manager. Alex Glowacky will serve as project manager. Alex Stern will serve as deputy project manager.
 - The State project lead will provide timely decision-making and responses to information requests from the BerryDunn project team.
 - All project documents—including meeting outcomes, action items, issues, risks, and decisions—will be on the State-designated site and will be brought to the attention of the BMS project sponsor.
 - Deliverables will be provided in an agreed-upon format.
 - BerryDunn recognizes that external factors, such as stakeholder involvement, might impact project timelines. BerryDunn will work with the State project sponsor and State project lead to mitigate any such issues.
 - The estimated number of hours reflected in the SOW assumes that BerryDunn will initiate no more than 15 projects as part of subproject management (outlined in Section 4.0 of this document).
 - BerryDunn and the State will explore strengthening West Virginia partnerships with states and other territories (such as the United States Virgin Islands [USVI]) and leverage any needed tools and procedures when applicable.

1.3 Project Funding

The State intends to utilize the Medicaid Management Information System (MMIS) Implementation Advance Planning Document (IAPD) WV-2024-01-08-MMIS-APDU-MITA for this SOW. The Centers for Medicare & Medicaid Services (CMS) has previously approved the MMIS IAPD on February 27, 2024, for total State and federal funds in the amount of \$95,085,478.00 as well as related unique project identifiers (UPIs) for the purposes of this SOW. The estimated cost of the services to be delivered under this SOW is \$1,498,800.00, (included in the approved Advance Planning Document (APD)). Therefore, any additional scope that is added to the services provided under this SOW may require the State to update its MMIS IAPD to allocate additional funds for project management.

2.0 Project Scope and Staffing Plan

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

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

Ref #	Project Deliverable/Service Approach and Completion Criteria	Responsible	Est. Hours
1.0	<p>Engagement Oversight</p> <p><i>Proposed Service Approach</i></p> <ol style="list-style-type: none"> <i>Ongoing Oversight</i> – BerryDunn's project leadership will regularly meet with the State project sponsor/manager to discuss project status and issues affecting timely completion of work; project leadership will also oversee BerryDunn staff, services, and quality assurance (QA) of deliverables. <i>Monthly Commissioner Briefing</i> – Project status updates will be included in the existing Monthly Commissioner Briefing Report. <p><i>Deliverable(s)</i> D01: Monthly Commissioner Briefing</p> <p><i>Completion Criteria</i> All parties will consider BerryDunn services complete when the State project sponsor or his/her designee formally accepts the Project Closeout Summary.</p>	<p>Eduardo Daranyi Nicole Becnel Peter Alfrey Emily McCoy Ethan Wiley Dawn Webb Alex Glowacky Susan Chugha Alex Stern</p>	700
2.0	<p>Project Initiation, Execution, and Control</p> <p><i>Proposed Service Approach</i></p> <ol style="list-style-type: none"> Provide monthly status updates in the form of a Monthly Status Report. Maintain an ongoing Guidance Log to track publications from federal partners. Coordinate and facilitate project team meetings, as necessary. Manage project action items, decisions, risks, and issues. <p><i>Deliverable(s) and Artifact(s)</i> D02: Monthly Status Report</p>	<p>Ethan Wiley Susan Chugha Alex Glowacky Alex Stern</p>	1,000

Ref #	Project Deliverable/Service Approach and Completion Criteria	Responsible	Est. Hours
	D03: Guidance Log A01: Action Item and Decisions Log A02: Risk and Issues Log <i>Completion Criteria</i> All parties will consider BerryDunn services complete when the State project sponsor or his/her designee formally accepts the Project Closeout Summary.		
3.0	Support for Medicaid Business Initiatives As part of the TAPS Phase VI Project, BerryDunn may provide support activities for the design, development, and implementation (DDI) of multiple Medicaid business initiatives and activities that BMS will undertake during the period of this SOW. <i>Proposed Service Approach</i> <ol style="list-style-type: none"> 1. <i>Policy and Program Research</i> – Review, analyze, and provide subject matter expertise to support successful policy and program operation and transformation. 2. <i>Financial Analysis and Modeling</i> – Assist with designing, developing, and implementing healthcare reform, including financing and funding strategies. 3. <i>Regulatory Analysis</i> – Evaluate, plan, and analyze opportunities related to State and federal regulatory changes to Medicaid, which could include existing, new, and/or proposed regulations. 4. <i>Waiver Design, Modification, and Implementation</i> – Design, develop, implement, or modify new Section 1115 waivers/1915 waivers or supporting existing waiver programs. 5. <i>Federal and Stakeholder Negotiation</i> – Provide consultation and guidance on strategies and potential responses during negotiations; facilitate meetings with CMS and other federal or state stakeholders. <i>Artifact(s)</i> A03: Research summaries and impact assessments A04: Waiver materials A05: Materials to support federal negotiation	Ethan Wiley Susan Chugha Alex Glowacky Peter Alfrey Maggie Anderson Julie Bandy Shandia Benke Krista Clay Julie DuPuis Valerie Hamilton Hailey Holden Azba Hotelwala Kourtney Kirk Marie LaPres Brody McClellan Katie McDonald Megan Blount Cate Poling Kitty Purington Sarah Renner Meghann Slaven Nicole Spears Alex Stern Sophie Torborg Liz Vose Dawn Webb Ryan Wrisley Dot Ball Alycia Minshall Caitlin Cabral	4,000

Ref #	Project Deliverable/Service Approach and Completion Criteria	Responsible	Est. Hours
	<p><i>Completion Criteria</i></p> <p>All parties will consider BerryDunn services complete when the State project sponsor or his/her designee formally accepts the Project Closeout Summary.</p>	<p>Carole Ann Guay Emily Hendrickson Janine DiLorenzo Jon Williams Jordan Ramsey Megan Hamilton KD Dobyne</p>	
4.0	<p>Subproject Management Program Support</p> <p><i>Proposed Service Approach</i></p> <ol style="list-style-type: none"> 1. <i>Project Management</i> – Conduct ongoing planning, monitoring, executing, and reporting of subprojects and ad hoc tasks in accordance with project management best practices. 2. <i>Ad Hoc Support</i> – Respond to ad hoc requests as-needed. <p><i>Artifact(s)</i></p> <p>A06: Subproject Task Requests</p> <p><i>Completion Criteria</i></p> <p>All parties will consider BerryDunn services complete when the State project sponsor or his/her designee formally accepts the Project Closeout Summary.</p>	<p>Alex Glowacky Susan Chugha Ethan Wiley Peter Alfrey Maggie Anderson Julie Bandy Shandia Benke Krista Clay Julie DuPuis Valerie Hamilton Hailey Holden Azba Hotelwala Kourtney Kirk Marie LaPres Brody McClellan Katie McDonald Cate Poling Megan Blount Kitty Purington Sarah Renner Meghann Slaven Nicole Spears Alex Stern Sophie Torborg Liz Vose Dawn Webb Ryan Wisley Dot Ball Alycia Minshall Caitlin Cabral</p>	4,000

Ref #	Project Deliverable/Service Approach and Completion Criteria	Responsible	Est. Hours
		Carole Ann Guay Emily Hendrickson Janine DiLorenzo Jon Williams Jordan Ramsey Megan Hamilton KD Dobyne	
5.0	Project Closeout <i>Proposed Service Approach</i> <ol style="list-style-type: none"> 1. <i>Project Closeout Summary</i> – One month prior to the completion of the SOW service dates, begin to prepare a Project Closeout Summary to document the work performed related to this SOW. The summary will provide the final status of deliverables, action items, issues, decisions, and risks. 2. <i>Transition</i> – Transition project materials to the project sponsor or their designee <i>Deliverable(s)</i> D04: Project Closeout Summary <i>Completion Criteria</i> All parties will consider BerryDunn services complete when the State project sponsor or his/her designee formally accepts the Project Closeout Summary.	Ethan Wiley Susan Chugha Alex Glowacky Alex Stern	641
Total Hours			10,341
Total Not-to-Exceed Cost Estimate			\$1,498,800.00

3.0 Project Resources and Hours

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

The following rates were used to compute the costs in the table:

- Commodity Line 9: Engagement Manager (EM) (\$270/hour)
- Commodity Line 8: Lead Project Manager (LPM) (\$215/hour)
- Commodity Line 11: General Project Manager (GPM) (\$180/hour)
- Commodity Line 12: Support Staff (SS) (\$80/hour)

Table 2: Project Resources – with Estimated Hours and Total Cost

CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
9	EM	\$270	Ed Daranyi	58	\$15,660.00
8	LPM	\$215	Nicole Becnel	360	\$77,400.00
11	GPM	\$180	Susan Chugha	350	\$63,000.00
11	GPM	\$180	Peter Alfrey	350	\$63,000.00
11	GPM	\$180	Maggie Anderson	338	\$60,840.00
11	GPM	\$180	Julie Bandy	338	\$60,840.00
11	GPM	\$180	Julie DuPuis	338	\$60,840.00
11	GPM	\$180	Valerie Hamilton	338	\$60,840.00
11	GPM	\$180	Marie LaPres	349	\$62,820.00
11	GPM	\$180	Brody McClellan	338	\$60,840.00
11	GPM	\$180	Emily McCoy	338	\$60,840.00
11	GPM	\$180	Kitty Purington	338	\$60,840.00
11	GPM	\$180	Sarah Renner	338	\$60,840.00
11	GPM	\$180	Meghann Slaven	338	\$60,840.00
11	GPM	\$180	Nicole Spears	338	\$60,840.00
11	GPM	\$180	Ethan Wiley	338	\$60,840.00
11	GPM	\$180	Liz Vose	338	\$60,840.00
11	GPM	\$180	Dawn Webb	338	\$60,840.00
11	GPM	\$180	Ryan Wrisley	338	\$60,840.00
11	GPM	\$180	Dot Ball	338	\$60,840.00

CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
12	SS	\$80	Alex Glowacky	314	\$25,120.00
12	SS	\$80	Shandia Benke	26	\$2,080.00
12	SS	\$80	Krista Clay	520	\$41,600.00
12	SS	\$80	Hailey Holden	65	\$5,200.00
12	SS	\$80	Azba Hotelwala	520	\$41,600.00
12	SS	\$80	Kourtney Kirk	26	\$2,080.00
12	SS	\$80	Katie McDonald	65	\$5,200.00
12	SS	\$80	Megan Blount	520	\$41,600.00
12	SS	\$80	Cate Poling	26	\$2,080.00
12	SS	\$80	Alex Stern	520	\$41,600.00
12	SS	\$80	Sophie Torborg	500	\$40,000.00
12	SS	\$80	Alycia Minshall Caitlin Cabral Carole Ann Guay Emily Hendrickson Janine DiLorenzo Jon Williams Jordan Ramsey Megan Hamilton KD Dobyne	702	\$56,160.00
			Total Hours:	10,341	\$1,498,800.00

4.0 Project Hours and Costs Per Month

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

Table 3: Estimated Project Costs by Month

Month #	EM	LPM	GPM	SS	Est.	Est. Cost Per Month
	Hours	Hours	Hours	Hours	Hours Per Month	
Month 1	5	15	471	294	785	\$112,875.00
Month 2	5	30	471	293	799	\$116,020.00
Month 3	5	30	471	293	799	\$116,020.00
Month 4	4	30	471	292	797	\$115,670.00
Month 5	4	30	468	292	794	\$115,130.00
Month 6	4	30	470	292	796	\$115,490.00
Month 7	4	30	471	292	797	\$115,670.00
Month 8	4	30	471	292	797	\$115,670.00
Month 9	4	30	471	292	797	\$115,670.00
Month 10	4	30	471	292	797	\$115,670.00
Month 11	5	30	471	293	799	\$116,020.00
Month 12	5	30	471	293	799	\$116,020.00
Month 13	5	15	471	294	785	\$112,875.00
Total	58	360	6,119	3,804	10,341	\$1,498,800.00

5.0 High-Level Timeline

The following table illustrates the proposed high-level timeline for Phase VI activities.

Table 4: Proposed High-Level Timeline

Task	1	2	3	4	5	6	7	8	9	10	11	12	13
1.0 Engagement Oversight													
2.0 Project Initiation, Execution, and Control													
3.0 Support for Medicaid Business Initiatives													
4.0 Subproject Management Program Support													
5.0 Project Closeout													



BerryDunn Authorized Signature

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

DocuSigned by:
Peter Alfrey
2DAAA44ADB3A477...

Signature

4/25/2024

Date

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

A handwritten signature in dark ink, appearing to be 'G. B.', written over a horizontal line.

Signature

5/1/24

Date

Appendix A: Resumes

Eduardo Daranyi, MEd, PMP®

Proposed Project Role:	Engagement Manager
Role at BerryDunn:	Principal
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	Bachelor of Science in Physics, Mathematics, and Business Administration, Hillsdale College Master of Education, Lesley College Certified Project Management Professional® Systems Engineering Development Program, Electronic Data Systems

Overview

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

Experience

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

BerryDunn (09/2005 – present)

Ed is a principal in BerryDunn's Government Consulting Group, leading the Medicaid practice area.

- **State of West Virginia (WV)**

- **WV Bureau for Medical Services (BMS)**

- *Engagement Manager (2012 – present)*

- In his role as engagement manager, Ed provides oversight of BerryDunn's contract with the Bureau to provide project management services for multiple projects. Ed joined the West Virginia project on a full-time basis in 2012 and has held many roles, including Engagement Manager, Lead Project Manager and General Project Manager. In 2012, took responsibility for stabilizing and growing the local Charleston office to now employ over 25 local staff. Ed has overseen over 100 projects for West Virginia. Ed has not only provided engagement oversight for projects listed below but has also played an active project support

role for a multitude of WV projects and initiatives.

- *Payment Error Rate Measurement (PERM) Project: Phase II (05/2020 – 05/2021)*
- *State Plan Review and Support (SPRS) Project (02/2020 – 05/2021)*
- *SUD Waiver Initiative Project (03/2019 – 05/2021)*
- *Technical Assistance and Program Support (TAPS) Project (11/2018 – 04/2021)*
- *Project Management and Support Services for the Access to Care Project Monitoring Phase (04/2016 – 10/2016; 03/2017 – 04/2021)*
- *Managed Care Organization Transition: Phase II (03/2020 – 02/2021)*
- *WVCHIP MCO Operational Readiness Review Assistance (09/2020 – 12/2020)*
- *MMIS Fee Schedule and Edit Quality Review (09/2017 – 09/2018; 01/2019 – 04/2020; 06/2020 – 11/2020)*
- *Enterprise Program Management Office (EPMO) (11/2018 – 10/2020)*
- *Lead project manager until 6/30/2019; principal in charge as of 7/1/2019*
- *Mountain Health Trust (MHT) MCO Procurement Assistance Project: Phase II (05/2020 – 09/2020)*
- *Mountain Health Promise (MHP) Implementation Project Management Support (03/2020 – 06/2020)*
- *Children with Serious Emotional Disorder 1915(c) HCBS Waiver (CSEDW): Phase II (10/2019 – 05/2020)*
- *Coordinated Care Management Project Management and Procurement Assistance Project (02/2019 – 01/2020)*
- *Electronic Visit Verification (EVV) Solution Implementation Project (06/2018 – 12/2019)*
- *Lead project manager until 6/30/2019; principal in charge as of 7/1/2019*
- *Medicaid Enterprise Integrated Eligibility (EIE) Solution (10/2017 – 09/2019)*
- *Data Visioning and Warehouse Development and Procurement Assistance Project (09/2017 – 08/2019)*
- *WVCHIP MCO Transition Planning Project (01/2019 – 07/2019)*
- *Provider Enrollment (PEA) Project (2012 – 2015; 03/2017 – 02/2018; 05/2018 – 05/2019)*
- *WVCHIP Data Warehouse / Decision Support System (DW/DSS) Historical Data Testing and Implementation (2012 – 2015; 10/2017 – 04/2019)*
- *Third Party Liability Options Analysis and Procurement Assistance Project (08/2018 – 11/2018)*

-
- *Innovation Accelerator Program (IAP) Data Analytic Technical Support (09/2017 – 08/2018)*
 - *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (08/2015 – 08/2018)*
 - *Technical and Information Enterprise Project Management Services (TEPMS) Project (05/2017 – 07/2018)*
 - *Gap Analysis and Project Management Services (GAPMS) (10/2016 – 06/2018)*
 - *Asset Verification System (AVS) Project Management Services and Procurement Assistance (04/2017 – 01/2018)*
 - *West Virginia/New Jersey MMIS Implementation and Certification Leverage and Reuse Project (01/2017 – 01/2018)*
 - *E&E RFP Development Assistance (10/2015 – 12/2017)*
 - *Income Maintenance Manual Update Project (09/2016 – 09/2017)*
 - *Updates to West Virginia Health IT (HIT) Plans and HIT and Health Information Exchange (HIE) Advance Planning Document (APD) Assistance (03/2016 – 04/2017)*
 - *Project Management of MMIS Procurement, DDI, and Certification (07/2015 – 12/2016)*
 - *Safe at Home APD Update (08/2015 – 11/2016)*
 - *RAPIDS (Eligibility System) Transition Facilitation Project (02/2016 – 05/2016)*
 - *ICD-10 Transition Planning and Implementation (09/2013 – 03/2016)*
 - *E&E APD (06/2015 – 09/2015)*
 - *PPACA Workgroup Oversight (2012 – 2015)*
 - *5010 Refresh Project (2012 – 2015)*
 - *State Medicaid Health IT Planning and Health Care Reform Consulting (2012 – 2014)*
 - *Non-Emergency Medical Transportation (NEMT) RFP Development (2012 – 2013)*
 - *MITA 3.0 Organizational Redesign (2013)*
 - *Policy Workflow Assessment (2013)*
 - *Prior Authorization Forms Revisions (2013)*
 - *ePrescribing Helpdesk and Support (2012)*
 - *Molina Health PAS Medicaid Management Information System (MMIS) Implementation*
 - *Medicaid Data Warehouse/Decision Support System (DW/DSS) Implementation*
 - *Substance Use Disorder 1115 Waiver Development and Implementation*

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- *Affordable Care Act (ACA) Analysis and Advisory services*
 - *ICD-10 Compliance*
 - *Eligibility and Enrollment (E&E) Systems Modernization*
 - *Adult Quality Measures*
 - *Centers for Medicare & Medicaid Services (CMS) Advance Planning Development*
 - *Medicaid Information Technology Architecture (MITA) 3.0 State Self-Assessment*
 - *Childrens Health Insurance Program (CHIP) Implementation and Stabilization*
 - *Access to Care Planning and Monitoring*
 - *Provider Re-enrollment*
 - *Asset Verification System Procurement*
 - *West Virginia (WV) CHIP Operational Readiness Review (2019 – present)*
Ed is the Engagement Manager overseeing the State's transition of the WVCHIP program from fee-for-service (FFS) to managed care to provide more seamless care between the two programs and offer greater efficiency and opportunities for innovation. The team performs desktop audits of policies and procedures and on-site systems demonstrations of three managed care organizations (MCOs) selected to provide services to WVCHIP members. The team developed a framework and approach to performing the review; developed a comprehensive readiness assessment tool; facilitated Operational Readiness Review (ORR) entrance conferences with the MCOs; and performed an evaluation of more than 1,000 MCO policies and procedures to complete the desk-level assessment for the WVCHIP transition to managed care. The team developed unique and tailored findings reports for each of the MCOs and will prepare an Ongoing Performance Monitoring Transition Plan and facilitate a Virtual MCO Systems Review to assist WVCHIP in assessing MCO readiness.
 - *WVCHIP MCO Transition Planning Project Phases I and II (03/2019 present)*
Ed provides Engagement Management oversight to help the State transition members from an FFS model to managed care. BerryDunn provides project management and support services; systems transition and readiness planning; facilitation of MCO, MMIS, and Enrollment Broker (EB) file testing; facilitation of weekly Out-of-Pocket (OOP) Maximum workgroup discussions with the fiscal agent, MCOs, WVCHIP, and other key stakeholders and development of the WVCHIP managed care contract. BerryDunn supported technical implementation activities for WVCHIP in advance of the January 1, 2021, go-live date.
 - *Substance Use Disorder (SUD) Waiver Initiative Project (02/2016 – present)*
As engagement manager, Ed, with the BerryDunn team of specialists, developed and successfully negotiated a Section 1115 Waiver Demonstration Project to undertake SUD delivery system transformation efforts in WV. The SUD waiver strengthened the State's SUD delivery system to improve the care and health

outcomes for State beneficiaries with SUD through expanded SUD service coverage and the introduction of new programs to improve the quality of care. The team provides annual and quarterly reporting to CMS and financial reporting requirements for budget-neutrality, future technology procurements to support the five-year demonstration, and MCO contract requirements specific to the SUD demonstration. Through this Section 1115 Waiver, WV can test innovative policy and delivery approaches to reform systems of care for individuals with SUD.

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

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

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

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

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

Ed provided quality assurance services for WV's MMIS implementation. In addition, Ed worked with the State to oversee several new initiatives that needed to be implemented while the new MMIS was becoming operational, including Medicare Part D and the Health Insurance Portability and Accountability Act (HIPAA) NPI. Ed

also focused on establishing and assisting in the management of change management processes and participated in the certification process and report process development.

WV Department of Human Services (DoHS)

- *Engagement Manager (06/2012 – present)*

In his role as engagement manager, Ed provides oversight of BerryDunn's contract with DoHS to provide project management services for multiple projects and initiatives, including:

- E&E System Modernization
- Procurement Services
- Eligibility Systems Planning, Procurement, and Implementation

- *People's Access to Help (PATH) DDI Project Management (10/2017 – present)* Ed, alongside other principals engaged in work for the State, provides strategic direction and oversight to the project team implementing the largest information technology transformation project that WV has ever undertaken, the Medicaid enterprise integrated eligibility system (IES), known as PATH. PATH supports the eligibility, enrollment, and administration of the Department of Human Services' (DoHS) programs, including Medicaid, CHIP, Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. Ed provides executive leadership working with the internal team, the State, and all vendors, helping ensure that all project deliverables are met, and risks and issues are appropriately escalated and addressed.

- **Maine Department of Health and Human Services (DHHS)**

- *Independent Verification & Validation (IV&V) and QA Services (04/2008 – 06/2012)*

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

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

- **North Carolina Office of the State Auditor**

- *Independent Audit of the State IT Services EPMO (04/2007 – 06/2007)*

BerryDunn was hired by the North Carolina Office of the State Auditor to conduct

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

- **Maine Department of Health and Human Services (DHHS) – Independent Verification & Validation (IV&V) and QA Services (04/2008 to 06/2012).**

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

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Martin's Point Health Care (2005 to 2007). Ed led a project management effort for Martin's Point Project Management for HIPAA Compliance initiative. He performed an organizational assessment and worked with executive leadership to develop a governance model, which then in turn directed the development of policies and procedures aimed at keeping the organization in compliance with the HIPAA Rule. Ed facilitated meetings with departments across the organization to create the policies and procedures, presented them to the HIPAA oversight board for approval, and then assisted with the training and implementation of the new procedures.

Goold Health Systems (1999 to 2005).

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

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

- **Maine DHHS (05/2001 to 01/2002).** While employed by GHS, Ed served as technical project coordinator for Maine's MMIS Pharmacy Preferred Drug List and Supplemental Rebate implementation. In this role, Ed coordinated implementation activities; prepared reports for senior management; developed and monitored work plans; and performed research, analysis, and evaluation of programs, projects, and operational procedures.

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

Presentations

- *Flexible Contracting and Contracting Best Practices*, Presentation for MESC 2014, 8/19/2014
- *Project Management/Testing*, Presentation for NESCSO workshop (2017)
Moderator, MESC Conference sessions (2015-2019)
- *People and processes: Planning health and human services IT systems modernization to improve outcomes*, 11/23/2020 Blog
- Published Insights on www.berrydunn.com include but are not limited to: NAMD 2020 reflections: Together toward the future and MESC 2020: Where we are today and where we will be tomorrow.

Nicole Becnel, PMP®

Proposed Project Role:	Engagement Manager
Role at BerryDunn:	Principal
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	Bachelor of Arts in Speech and Hearing Science, University of South Florida Certified Project Management Professional (PMP®) Executive Coaching Certification®

Overview

Nicole brings valuable expertise in her field as a qualified Medicaid IT professional with over 20 years of experience in health and human services project management experience. Her breadth of knowledge includes strategic planning, portfolio, program and project management, business analysis, system design, development, and testing for large health information enterprise systems. She is currently working with the State of West Virginia (WV) overseeing the State's Medicaid Enterprise and leverage and reuse initiatives.

Experience**BerryDunn (06/2010 – present)**

Nicole works with BerryDunn's Medicaid Practice Group. Nicole has been expertly providing valuable project oversight and coordination while helping to establish and maintain engaging and productive client and vendor relationships for WV projects and initiatives for over a decade. Project highlights include:

- **State of WV**
 - *Lead Manager (2012 – present)*
 - *MCO ORR Assistance (09/2020 – 12/2020)*
 - *MMIS Fee Schedule and Edit Quality Review Project: Phase III (06/2020 – 11/2020)*
 - *MHT MCO Procurement Assistance Project: Phase II (05/2020 – 09/2020)*
 - *SUD Waiver Initiative Phase 4 (04/2020 – 05/2021)*
 - *MHP Implementation (Coordinated Care Management) (03/2020 – 06/2020)*
 - *MCO Transition: Phase II (03/2020 – 02/2021)*
 - *State Plan Review and Support (SPRS) (02/2020 to 05/2021)*
 - *Technical Assistance and Program Support (TAPS): Phase 2 (11/2019 – 04/2021)*
 - *Children with Serious Emotional Disorder Waiver (CSEDW) Initiative: Phase II (10/2019 – 05/2020)*
 - *WVCHIP MCO Transition Planning (01/2019 – 07/2019)*

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- *SUD Waiver Initiative: Phase III (03/2019 – 03/2020)*
 - *MMIS PERM Phase II (05/2020 – 05/2021)*
 - *Coordinated Care Management Transition Project Management and Procurement Assistance (02/2019 – 01/2020)*
 - *MMIS Fee Schedule and Edit Quality Review Phase II (01/2019 – 04/2020)*
 - *Enterprise Program Management Office (EPMO) (11/2018 – 10/2020)*
 - *TAPS (11/2018 – 10/2019)*
 - *EVV Solution Implementation (06/2018 – 12/2019)*
 - *Provider Enrollment (PEA) Year 2 (05/2018 – 05/2019)*
 - *Contract Edit Fee Schedule Review (09/2017 – 09/2018)*
 - *Innovation Accelerator Program (IAP) Data Analytic Technical Support (09/2017 – 08/2018)*
 - *MITA State Self-Assessment (SS-A) Maintenance and Annual Update Assistance (09/2017 – 08/2018)*
 - *Data Visioning and Warehouse RFP Development and Procurement Assistance (09/2017 – 08/2019)*
 - *Technical and Information Enterprise Project Management Services (TEPMS) (05/2017 – 07/2018)*
 - *Access to Care Project Monitoring Phase (03/2017 – 04/2021)*
 - *Provider Re-enrollment (PEA) (03/2017 – 02/2018)*
 - *R-MMIS Implementation and Certification Leverage and Reuse Project (01/2017 – 07/2017)*
 - *Gap Analysis and Project Management Services (GAPMS) (10/2016 – 06/2018)*
 - *Income Maintenance Manual (IMM) Update (09/2016 – 09/2017)*
 - *Access to Care Project (Access Monitoring Plan Phase) (04/2016 – 10/2016)*
 - *Updates to WV Health Information Technology (HIT) Plans and HIT and Health Information Exchange (HIE) APD Assistance (03/2016 – 04/2017)*
 - *RAPIDS Transition Facilitation (02/2016 to 05/2016)*
 - *Medicaid Eligibility and Enrollment RFP Development and Procurement Assistance (10/2015 – 12/2017)*
 - *ICD-10 Readiness Assessment, Implementation and Migration (09/2013 – 03/2016)*
 - *MITA State Self-Assessment (SS-A) Maintenance and Annual Update Assistance (08/2015 – 08/2017)*
 - *MMIS DDI and Certification (07/2015 – 12/2016)*
 - *Medicaid Eligibility and Enrollment APD (06/2015 – 09/2015)*
 - *PPACA Workgroup Oversight (2012 – 2015)*
 - *5010 System Refresh (2012 – 2015)*
 - *HIT Statewide Strategic Plan development (2012 – 2014)*
 - *Provider Enrollment (2012 – 2015)*
 - *MITA 3.0 Organizational Redesign (2013)*
 - *Policy Workflow Assessment (2013)*

WV Department of Human Services (DoHS)

- *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (07/2020 – present)*

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

- *Electronic Visit Verification (EVV) Solution Implementation Project (03/2018 – 06/2023)*

Nicole led the project team implementing the overall EVV solution. Her work included strategic planning, organizational change management, requirement development, Request for Proposals (RFP) draft narratives and supporting documentation efforts, certification planning and assistance, Advance Planning Document (APD) development and updates, evaluation and scoring support/facilitation, vendor onboarding, vendor deliverable review, and User Acceptance Testing (UAT) planning and support.

- *Integrated Eligibility Solution (IES)/People's Access to Help (PATH) Procurement Support and Design, Development, and Implementation (DDI) Project Management (10/2015 – present)*

Nicole is the Lead Project Manager for WV's largest information technology transformation project, the Medicaid Enterprise IES, known as PATH. PATH supports the eligibility, enrollment, and administration of the DoHs's programs, including Medicaid, Children's Health Insurance Program (CHIP), Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. Nicole provides executive leadership working with the internal team, the State, and all vendors. She reviews, coordinates, and oversees statements of work (SOWs), deliverables, and risk and issue management.

- *APD Assistance (07/2010 – present)*

Nicole is the Lead Project Manager overseeing the development and approval of APDs to help the State obtain federal funding for Medicaid Enterprise System modernization initiatives such as the Medicaid performance management and quality assurance, third-party liability (TPL) planning, adding CHIP data to the Medicaid DW, Payment Error Rate Measurement (PERM), and the PATH

implementation. Nicole's guidance within the APD process has helped WV secure and maintain millions of dollars in federal funding.

- *COVID-19 Contact Tracing and Testing Initiative (04/2020 – 09/2020)*
Nicole led the team that assisted the State with the response to the COVID-19 public health emergency. She supported the DoHS Commissioners and the Secretary to help ensure the State had the support they needed to address COVID-19 and the response to its aftermath. She oversaw the procurement and implementation of a contact tracing and disease investigation software system, the procurement of federal funding for epidemiological activities and testing and staffing and organizational development activities for DoHS and Bureau for Public Health (BPH). The software helped the State coordinate its contact tracing initiatives and use of the contact tracing platform across a workforce of DoHS volunteers, the National Guard, WV University staff, and State local health departments. The outcome of the project was the successful statewide launch of the new contact tracing and disease investigation software and the procurement of \$37 million in federal relief funding for public health initiatives related to COVID-19.
- *Mountain Health Promise (MHP) Implementation Project Management Support (03/2020 – 06/2020)*
Nicole was the Lead Project Manager overseeing the team, assisting the State to help ensure a successful implementation and smooth operational transition of the MHP program. The program was administered by a specialized MCO serving children in the child welfare populations, including foster care (FC) and adoption assistance (AA), as well as those enrolled in the Children with Serious Emotional Disorder (CSED) 1915(c) waiver.
- *West Virginia Children's Health Insurance Program (WVCHIP) Operational Readiness Review (12/2019 – 10/2020)*
Nicole was the Lead Project Manager overseeing the State's transition of the WVCHIP program from fee-for-service (FFS) to managed care to provide seamless care between the two programs and offer greater efficiency and innovation opportunities. The team performed desktop audits of policies and procedures and on-site systems demonstrations of three MCOs selected to provide services to WVCHIP members. The team developed a framework and approach to performing the review; developed a comprehensive readiness assessment tool; facilitated Operational Readiness Review (ORR) entrance conferences with the MCOs; and performed an evaluation of more than 1,000 MCO policies and procedures to complete the desk-level assessment for the WVCHIP transition to managed care. The team developed unique and tailored findings reports for each MCO and prepared an Ongoing Performance Monitoring Transition Plan and facilitate a Virtual MCO Systems Review to assist WVCHIP in assessing MCO readiness.
- *Mountain Health Trust (MHT) MCO Procurement Assistance Phase I and Phase II Projects (07/2019 – 09/2020)*

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

- *Provider Management Support (07/2019 – 01/2021)*
Nicole served as the Lead Project Manager assisting WV with its leverage and reuse initiatives demonstrating the Leverage Condition established by Centers for Medicare & Medicaid Services (CMS) in the Medicaid Information Technology Architecture (MITA) Seven Standards and Conditions. The team also supported WV Medicaid leadership to execute a multi-state collaborative where states can collaborate, share information, and brainstorm solutions. Nicole led the project team that has supported WV with this initiative. Since its inception, WV has increased membership to 12 state partners that participate monthly.
- *Substance Use Disorder (SUD) Waiver Initiative Project (07/2016 – 06/2017)*
Nicole was the Lead MMIS Project Manager overseeing the SUD waiver initiative "Creating a Continuum of Care for Medicaid Enrollees with Substance Use Disorders" Section 1115 waiver demonstration. The waiver allows the State to strengthen its SUD delivery system to improve the care and health outcomes for State beneficiaries with SUD through expanded SUD service coverage and new programs to improve quality of care. The team provides annual and quarterly reporting to CMS and financial reporting requirements for budget-neutrality, future technology procurements to support the five-year demonstration, and MCO contract requirements specific to the SUD demonstration.
- *MITA 3.0 State Self-Assessment (SS-A) Maintenance and Annual Update Assistance Project (08/2015 – 01/2020)*
Nicole was the Lead Project Manager for BMS's MITA SS-A efforts, including the annual maintenance of SS-A activities and Data Management Strategy (DMS). She leads the organization development planning to support WV's MITA maturity and modernization efforts. The team is creating a road map and schedule to help the State assess areas for improvement and change specific to departmental and Bureau structure, operational improvements, talent development, and training. Organization development for the project will take the MITA SS-A findings and focus on the DoHS goals and objectives for its MMIS, the technical architecture assessment of the State's Medicaid modules' maturity levels, and business area assessments of the State's Medicaid system modules. These activities clarify BMS's short-term and long-term strategic goals and help BMS request enhanced federal funding to achieve those goals.
- *Project Management of MMIS Procurement, DDI, and Certification (12/2012 –*

09/2013)

Nicole served as a project manager for the DDI of the Molina HealthPAS MMIS. Her work on the project included oversight of contract start-up activities and system design sessions.

- *Provider Enrollment (PEA) Project (07/2011 – 12/2012)*

Nicole supported the Bureau with her project, program and portfolio management, and subject matter expertise as it implemented healthcare reform. This work included implementation of provider enrollment screening requirements for various provider classifications to reduce potential fraud and abuse. Nicole also assisted with provider outreach activities, including presentations and training at Provider Workshops held throughout the State.

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

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

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

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

- **New Jersey Division of Medical Assistance and Health Services**

- *MMIS Implementation and Certification Leverage and Reuse Project (01/2017 – 01/2018)*

As Engagement Manager, Nicole oversaw the BerryDunn team working in collaboration with the New Jersey Implementation Team Organization (ITO) for the Replacement MMIS (R-MMIS). In her role, she was responsible for the oversight of the Leverage and Reuse, Testing, and Certification project activities.

Molina (formerly Unisys MMIS Operations) (09/2001 – 06/2010)

- **Project Manager for MIHMS Provider Enrollment**

Nicole served as Project Manager and SME for the Maine DHHS provider re-enrollment and maintenance implementation project, which created an online tool for enrollment, re-enrollment, and maintenance for Maine's provider community consisting of approximately 8,000 providers. Nicole managed large and complex configuration projects and provided

expertise to other implementation initiatives, including conversion, reporting, and interface development.

- **WV MMIS**

Nicole managed the development, implementation, and evaluation of quality management and risk management activities to help ensure project compliance with all budget, time, and quality specifications to help assure client requirements across the Medicaid Enterprise. In her role, Nicole successfully project managed the on-time delivery of the NPI initiative in an accelerated time frame, successfully provided on-site support to BMS during the CMS certification evaluation, facilitated best practice cross communication, and met customer expectations by monitoring, evaluating, and assigning corrective actions.

- **Contract Configuration and Reports Lead for WV MMIS**

Nicole developed, implemented, and documented processes and standards to help ensure successful completion of reports. Additionally, she analyzed business processes to transition the configuration to meet the current application. Working with the client, Nicole identified required changes and helped to ensure issues were identified, tracked, reported and resolved in a timely manner. She was also responsible for creating a MITA Report Card and Trending Analysis Report tracking deliverables and report progress.

- **Project Management Support**

Nicole served in a project management support services role for State Medicaid initiatives, including the Kentucky MMIS DDI project. Her work involved schedule management, action item management, training support, provider development, and UAT planning. She also helped ensure the appropriate project organization processes were closely followed.

Presentations

“Modularity GPS: Defining the Road map and Understanding the Landscape,” Presentation for MESC 2016, Co-presented with Lisa Alger (CSG Government Solutions) and Andrea Danes (CSG Government Solutions), 08/16/2016

“Managing in a Modular MMIS Implementation,” Presentation for MESC 2014, 08/21/2014

Susan Chugha, Prosci® CCP

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Manager
Years of Experience Relevant to Proposed Role:	15 years
Certifications and Education:	Bachelor of Arts in Business Management, Belmont Abbey College Prosci® Certified Change Practitioner Medicaid Learning Center (MLC) Certified Medicaid Professional (MCMP-II)

Overview

Susan is a manager for the Government Consulting Group (GCG) who brings over 19 years of project management experience. During the past eight years, Susan has honed her expertise on policy and Medicaid program efforts in various roles, including program manager, project manager, business analyst, and project coordinator. She focuses her time and experience on 1115 waiver demonstrations, multiple years of experience with the Medicaid Information Technology Architecture (MITA) State –Self Assessment (SS-A) report and road map activities, business process improvement, data quality initiatives, project, and program management.

Experience
BerryDunn (10/2015 –present)

Susan works within BerryDunn's Medicaid Practice Group (MPG) and project highlights include the following:

- **State of West Virginia (WV)**

- **WV Bureau for Medical Services (BMS)**

- *Substance Use Disorder (SUD) Waiver Initiative Project Phase V (10/2016 – present)*

Susan manages the current ongoing phase of the SUD waiver initiative project and leads a team of five consultants. Her responsibilities include providing oversight of the project team's day-to-day activities, facilitating meetings, and monitoring progress against the agreed-upon deliverables. She conducts deliverable review on all documents. She performs research on SUD services, Centers for Medicare & Medicaid (CMS) requirements, and State policies and procedures to support waiver activities. She drafts monitoring reports and oversees the project team completes assignments on time for federal submission. During this most recent phase of the project, Susan assisted in the development of the 1115 waiver renewal application and successful submission, created documents for the federal public comment period, presented during the public hearings, and oversaw all

communications with federal partners and actuarial vendors.

Prior to moving into the project manager role during the implementation phase of the project, Susan was the project coordinator for waiver development, negotiation, and approval phases of the project. She performed client outreach, managed communications with federal partners, scheduled meetings, captured meeting notes, tracked action items and decisions, conducted research, and business analysis. Also, during the waiver implementation phase, Susan managed the development of a peer recovery support specialist webinar and was involved in policy development, public comment tracking, and policy approval. Under the waiver development phase, Susan assisted the client with developing a continuum of care for Medicaid enrollees with SUD by overseeing waiver negotiations with the CMS. She facilitated meetings, performed research analysis, assisted in draft policy development, assisted with writing the waiver application, and created and maintained a work plan to track required tasks. Susan also scheduled and organized public hearings to promote the waiver application.

- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (10/2016 – present)*

As project manager for the MITA 3.0 SS-A Maintenance and Annual Update Assistance project Susan assists with MITA life cycle maintenance activities including developing new business process improvement flows and updating MITA related reports. Susan manages nine consultants and two sub-contractors. Her responsibilities include oversight of the team, budget, and time management, and peer review and delivery of required deliverables. She assists with the development of the update of the health information technology (HIT) report, data management strategy (DMS) report, and the technical management strategy (TMS) report. Additionally, during 2021 Susan monitored a team of subject matter experts to draft and deliver an organizational development (OD) plan and road map. She facilitated meetings and oversaw the development of the revised aged and disabled waiver (ADW) business process flow workgroups.

Susan moved into the project manager role in November 2019. She provides oversight to the project team and manages the project budget and deliverables. Susan managed the flow of information and access to the client's MITA Management Portal (MMP) SharePoint site that stores and tracks all the required MITA SS-A documents (e.g., business process forms, scorecards, goals and objectives, roadmaps, concept of operations, SS-A reports, supporting documentation) used for current and past assessments.

- *Data Improvement Project (DIP) Phase 3 (12/2019 – present)*

Susan was the project manager for the DIP Phase 3 project. Susan was responsible for providing oversight to the project team on the day-to-day activities, handles meeting facilitation, peer review and monitors progress with all deliverables tracked against the agreed-upon schedule that will address data quality and usability issues identified within the Medicaid program.

- *State Plan Review and Support (SPRS) Project (03/2020 – present)*

As program manager, Susan oversees the project and BerryDunn team that handles updates to State Plan sections, attachments, supplements, and develops amendments.

Prior to becoming the program manager, Susan served as an analyst for the SPRS project, where she reviewed an end-to-end version of the State Plan and documented missing or inconsistent details to help the State have more confidence in the Plan. She also reviewed and analyzed sections of the State Plan to help ensure that the pages comply, compared service descriptions to federal and State guidance, and analyzed pages for overall accuracy.

- *American Rescue Plan Act of 2021, Section 9817 Home and Community-Based Services (HCBS) Implementation Plan (05/2022 – present)*

As project lead, Susan oversees the day-to-day operations for this project, conducts research, and monitors the successful completion and submission of project and federal deliverables.

- *Technical Assistance and Program Support (TAPS): Phase 4 (05/2022 – present)*

Serving as program manager for the TAPS project, Susan oversees the project team monitoring activities and the requests of incoming sub-projects for ongoing technical support and assistance activities for new initiatives.

- *Children with Serious Emotional Disorder 1915(c) HCBS Waiver (CSEDW) Phase IV (09/2018 – present)*

As program manager for the CSEDW Phase IV project, Susan oversees the project team through oversight, project management, technical assistance, and monitoring risks and issues. Prior to Phase IV of the project, Susan helped monitor progress on the preparation of the CSEDW waiver renewal application.

In 2018 Susan served as the project coordinator for the CSEDW project. Susan was responsible for project coordination, which included client outreach, scheduling, notetaking, document review, research, and business analysis. Susan also coordinated and executed multiple public forum events throughout the State of WV.

- *Certified Community Behavioral Health Center (CCBHC) SPA Project Phase II (11/2023 – present)*

As program manager for the CCBHC SPA Project Phase II, Susan oversees the project team through oversight, project management, budgeting, and monitoring risks and issues. Susan has supported the project manager with meeting facilitation duties, client relations, assisted in the development of the provisional certification status application, and contributed to the reviews and scoring sessions of the provider provisional certification applications to help identify providers that would be awarded provisional certification as a CCBHC provider type.

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- *American Rescue Plan Act (ARP) Section 9813: Mobile Crisis Grant Projects I and II (07/2021 – 11/2023)*
Serving as program manager, Susan oversaw this project and provided subject matter expertise and support for the design, development, and implementation of a State Plan Amendment to add a Mobile Crisis Program to the WV Medicaid Program. As part of this, Susan participated in writing and planning assistance for the “State Planning Grant for Qualifying Community-Based Mobile Crisis Intervention Services” planning grant application. In organizing the response, writing the application, and assisting BMS in communications to CMS, the team helped BMS in the successful award from CMS to the State of an \$847,527 grant to implement qualifying community-based mobile crisis intervention services. Susan’s project oversight helped contribute to the successful approval of the Mobile Crisis SPA approval from CMS on September 5, 2023.
 - *CCBHC SPA Project (09/2022 – 8/2023)* As program manager for the CCBHC SPA Project, Susan was responsible for oversight of the project team, assisted with project management, tracked the project budget, and monitored any risks and issues.
 - *OD Services Project (05/2022 – 11/2023)*
As a business analyst (BA) on the OD project, Susan assisted with client relations, retreat planning and coordination, research, and writing assignments that helped to inform strategic planning documents, in addition to other identified deliverables per the agreed-upon SOW.
 - *Provider Enrollment Application (PEA) Project (02/2017 – 11/2017)*
Susan provided project coordination assistance by maintaining all the meeting management duties, which included scheduling meetings, creating agendas, capturing meeting notes, and tracking action items, risks, and decisions. Susan developed project timelines, managed the document repository, conducted research, and updated necessary documents that were critical to the success of the project, which was to enhance the current WV PEA process.
 - *ICD-10 Transition Planning and Implementation (10/2015 – 02/2016)*
Susan was responsible for meeting management, as well as maintenance of the document repository for the project. In addition, she attended policy review and workgroup meetings.
 - **Independent Consultant (08/2010 – 10/2014)**
Susan worked with her clients to help with event planning, property management, maintaining calendars and contact lists, managing correspondence as well as service provider relationships, scheduling of both professional and personal appointments, and making travel arrangements.
 - **Columbia Management (09/2012 – 10/2013)**
Susan worked as a scheduling coordinator and administrative assistant, Susan partnered with five regional wholesalers within the U.S. to manage territory rotation for external wholesalers, schedule daily financial advisor meetings and handle reschedules,

coordinate local client events, process monthly expense and activity reports, and complete as-needed ad hoc assignments.

- **Evergreen Investments (06/2004 – 05/2009)**

Susan worked as a Project Manager, assisting the Vice President in the Sales and Initiatives Department and served in multiple roles over her duration at the firm. Susan's responsibilities included the following:

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

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

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

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

Susan served as an executive administrative assistance and office manager, supporting both the Managing Director of Global Distribution and the Director of Internal Sales. Her administrative duties included answering phone calls, scheduling meetings, making travel arrangements, processing expense reports, minute taking & distribution, coordination of meetings and conferences for office professionals. In addition, she created PowerPoint

presentations, monthly reports, territory maps, emergency contact lists, etc.; organized, scheduled internal trainings, and maintained relationships with business partners; and maintained office and office equipment that supported over 50 associates.

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

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Principal
Years of Experience Relevant to Proposed Role:	17 years
Certifications and Education:	Master of Business Administration, Organizational Management, Husson University Master of Arts in History, Providence College Bachelor of Arts in Journalism and Communication, Spanish Minor, University of Oregon Certified Project Management Professional (PMP®) Prosci® Certified Change Management Practitioner (CCP) Lean Six Sigma Green Belt Certification

Overview

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

Experience
BerryDunn (03/2014 – present)

Peter is a principal and project manager supporting WV DoHS and BMS, performing duties that include, but are not limited to coordinating communications across the BerryDunn portfolio management office, helping ensure resolution of project-related issues, and disseminating necessary information to the project team(s) and escalating appropriately to the engagement's portfolio manager, and/or program managers.

- **State of WV**

- **WV DoHS, BMS, and West Virginia Children's Health Insurance Program (CHIP)**

- *Portfolio Manager – West Virginia Engagement: Portfolio Management Office (09/2018 – present)*

Peter provides strategic direction for BerryDunn's WV engagement team and for specific DoHS/BMS/WVCHIP projects. Portfolios, programs, and projects include:

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- *Mountain Health Trust (MHT) Phase II (12/2023 – present)*
 - *Incident and Case Management System (ICMS) Procurement Assistance (02/2023 – present)*
 - *Public Health Emergency (PHE) Support (12/2021 – present)*
 - *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (09/2020 – present)*
 - *Data Improvement Project—Phases I, II and III (09/2019 – present)*
 - *Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project Phases I, II, III and IV (09/2019 – present)*
 - *Medicaid Enterprise System Modernization Strategy and Procurement—Phase I, II and III (10/2020 – 10/2023)*
 - *MCO Encounter Data Quality—Phases I and II (06/2020 – 02/2022)*
 - *Mental Health Parity and Behavioral Health Services Support (05/2020 – 09/2022)*
 - *Contact Tracing (04/2020 – 09/2022)*
 - *MHT MCO Procurement Assistance Project Phases I and II (06/2019 – 06/2021), and Mountain Re-Procurement (03/2020 – 08/2022)*
 - *Coordinated Care Management Project Management and Procurement Assistance / Mountain Health Promise Implementation Project Management Support and Operational Readiness Review (02/2019 – 06/2020) and MHP Re-Procurement (10/2021 – 09/2022)*
 - *WVCHIP Operational Readiness Review (09/2020 – 01/2021)*
 - *WVCHIP MCO Transition Planning Project Phases I and II (03/2019 – present)*
 - *WVCHIP Out of Pocket Maximum (05/2021 – present)*
 - *Integrated Eligibility Solution (IES)/People's Access to Help (PATH) DDI Project Management (08/2018 – 11/2019)*
 - *Substance Use Disorder (SUD) Waiver Initiative Project (07/2017 – 03/2019)*
 - *Asset Verification System Project Management Services and Procurement Assistance (04/2017 – 02/2018)*
 - *Project Management of Medicaid Management Information System (MMIS) Procurement, DDI, and Certification (10/2014 – 12/2016)*

- **Washington Health Care Authority (HCA)**

- **Public Health Emergency Unwind Project (03/2023 – 12/2023)**

Peter served as Engagement Manager for the project, helping support the HCA's PHE unwinding efforts by overseeing the BerryDunn project team's project deliverables and reporting, supporting coordination of Washington inter-agency meetings and information sharing, and providing stakeholder management services.

- **New Jersey Division of Medical Assistance and Health Services**

- *MMIS Implementation and Certification Leverage and Reuse Project (01/2017 – 08/2017)*

Peter supported testing efforts for New Jersey MMIS implementation in areas such as Systems Integration Testing (SIT) test case and results review, SIT test case analysis, User Acceptance Testing (UAT) support, and UAT defect management. Such testing support leveraged and reused best practices and documentation from the WV MMIS procurement in 2015.

- **Vermont Green Mountain Care Board (GMCB)**

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

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

- **Maryland Health Benefit Exchange (HBE)**

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

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

Martin's Point Health Care (12/2008 – 02/2014)

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

Health Dialog (07/2006 – 11/2008)

As Implementation Project Manager, Peter oversaw operational planning, execution, and reporting of multi-faceted projects for new and existing clients (health plans, large employers, and government care management programs), including BlueCross BlueShield (various regions), Capital Health Plan, and the Centers for Medicare & Medicaid Services (CMS). He also managed cross-functional implementation teams, maintained communication with clients, set expectations regarding scope, and managed implementation schedules while managing multiple, concurrent implementations. He also served as Project Management Office lead for

company's smoking cessation nicotine replacement solution and initiative, overseeing product development work and collaboration with a third-party vendor.

Maggie Anderson, MS

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	34 years
Certifications and Education:	Bachelor of Science in Food and Nutrition, North Dakota State University Master of Science in Management, University of Mary

Overview

Maggie has more than 30 years' experience working in state government with federally funded programs for social services and nutritional programs. During her 14 years of experience as Medicaid Director, Maggie was a hands-on director and developed extensive knowledge of Medicaid statute, regulations and operations and she actively participated in creating and updating Medicaid state plan amendments and Medicaid 1915(c) waivers. Maggie is proficient at facilitation sessions with stakeholders, including Medicaid members, providers, tribal government representatives, legislators, and advocacy organizations. Maggie is also skilled at preparing and presenting expert testimony and reports to state legislators. She has a passion for home and community-based services (HCBS) and worked to expand HCBS options for members and to find creative ways to serve individuals in unique circumstances. Maggie also served as the governor-appointed director of the umbrella agency in which Medicaid was located and brings a broad perspective to how various programs (such as Child Welfare, Vocational Rehabilitation, and Aging Services) can be partnered with Medicaid.

Experience**BerryDunn (12/2021 – present)**

Maggie serves as a SME with the Medicaid projects in West Virginia, Minnesota and Puerto Rico. As a SME, she researches a wide variety of policy issues and prepares summaries of the relevant information for the client. In addition, she drafts Medicaid state plan amendments and reviews amendments prepared by other team members. Maggie also participates in team meetings and client meetings, including client meetings with the Centers for Medicare and Medicaid Services, and is able to share information, expertise and perspective from her years of service as a Medicaid Director. Maggie was the lead on writing a Money Follows the Person Grant for Puerto Rico, which was awarded in 2022. She also spearheaded a team to prepare an annual report (submitted September 2023) which Puerto Rico is required to submit to Congress.

North Dakota Department of Human Services (08/2005 – 05/2019)

Maggie worked as the Director of Medical Services Division responsible for the administration of the Medicaid Program, Medicaid Expansion, the Children's Health Insurance Program and Autism Spectrum Disorder services. She also served in the dual capacity as both Executive Director and Medicaid Director from August 2012 to December 2016. As the Executive Director, Maggie was responsible for all programs within the umbrella agency: Medicaid; the Children's

Health Insurance Program; Economic Assistance Programs including Child Care Assistance, the Supplemental Nutrition Assistance Program, Temporary Assistance for Needy Families (TANF), and the Low Income Home Energy Assistance Program; Child Support; Aging Services; Children and Family Services; Vocational Rehabilitation; Developmental Disabilities Services; Behavioral Health Services; and Field Services which includes the State Hospital, the Developmental Center, and eight regional human service centers.

During her tenure, Maggie had the opportunity to lead an effort to appeal a Centers for Medicare & Medicaid Services (CMS) disallowance to the Departmental Appeals Board (DAB). As part of this effort, Maggie researched relevant DAB appeals, statutes, and regulations and was responsible for preparing briefs and follow-up communication with the DAB.

North Dakota Department of Human Services (02/2003 – 08/2005)

Maggie served as the Deputy Director of Medical Services to assist the Division Director with program administration and budget development and oversight. She served as the business lead for the work leading up to the procurement of a Medicaid Management Information System.

North Dakota Department of Public Instruction (08/1989 – 02/2003)

Maggie administered the United States Department of Agriculture (USDA) Child Nutrition Programs in the Department of Public Instruction. She was responsible for the administration and oversight of the various USDA Child Nutrition Programs. Maggie was hired as a Child Nutrition Specialist and was promoted to Assistant Director during tenure.

Julie Bandy

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	Bachelor of Science in Social and Behavioral Sciences, Indiana University

Overview

Julie is an experienced health and management professional with more than 20 years' experience working with Medicaid policy and planning, case management programs, and report analyses. She has worked in both private and public sectors and specializes in Medicaid waiver projects, community support programming, and eligibility.

Experience**BerryDunn (12/2022 – present)**

- **State of West Virginia (WV)**

- **WV Department of Human Services (DoHS)**

- *Medicaid Enterprise System (MES) Home and Community Based Services, Incident and Case Management System (ICMS) project (12/2022 – present)*
Julie serves the ICMS project as a subject matter expert supporting requirements gathering, design, and research support. Directed streamlining of forms and processes for ICMS.
 - *Children with Serious Emotional Disorder 1915(c) Waiver (CSEDW) Development (03/2023 – 12/2023)*
Julie served the CSEDW project as a subject matter expert supporting waiver design and research. Responsible for creation and revision of policy to correspond to updated waiver application.
 - *Advance Planning Document (APD) Support Project (07/2023 – present)*
Julie serves the APD project as the ICMS subject matter expert supporting updates to that portion of the APD, and as a team member drafting portions of the overall document as needed.
 - *Mountain Health Trust (MHT) Phase II (02/2024 – present)*
Julie serves as a subject matter expert supporting the development of training and oversight materials.
 - *Legislative Implementation Assistance Project (LIAP) (07/2023 – 09/2023)*
Julie served the LIAP as a subject matter expert in the creation of a plan to implement legislatively required updates to the prior authorization requirements and processes in fee-for-service and managed care landscape. She was responsible for interpretation of requirements, identifying gaps in current system, and research support.
 - *Data Improvement Project (DIP) (03/2023-06/2023)*

Julie served the DIP as a subject matter expert, supporting the project manager with project management duties including development and review of materials.

Indiana Family and Social Services Administration (03/2011 – 12/2022)

Julie served as a Youth Provider Specialist, Medicaid HCBS subject matter expert, and ICMS product owner for the Division of Mental Health and Addiction's Child Mental Health Wraparound 1915 (i) SPA from 05/2013 to 12/2022. From 03/2011 to 05/2013, Julie served in the Office of Medicaid Policy & Planning as a Care Select Reporting Analysis, a Reporting Manager for Care Programs, and a Division of Disability and Rehabilitative Services (DDRS) Waiver Policy and Compliance Specialist. In each of these roles, she was responsible for Medicaid compliance, reporting, and program support to the operators of Medicaid funded programs.

Arbitre Consulting, Inc (06/2008 – 06/2010)

Julie served as an Evaluator with Inventory for Client and Agency Planning (ICAP) Assessments and worked on determining Level of Care (LOC) for Indiana Medicaid Waiver programs. She conducted ICAP assessments and health/behavioral appendix as well as serving as a member of reevaluation team for assessments needing additional review.

Jacobs Home, Inc (12/2005 – 10/2007)

Julie served in multiple roles at Jacobs Home, a Medicaid approved and enrolled 501c3 agency providing residential and community supports for adults with autism and other developmental disabilities.

- *Executive Director (05/2006 – 10/2007)*
- *Assistant Director (12/2005 – 05/2006)*

Sycamore Rehabilitation Services (06/2003 – 11/2005)

Julie served in multiple roles at Sycamore Services, a CARF accredited, 501c3 agency providing Medicaid-funded home and community-based support services to adults with autism and other developmental disabilities

- *Director, Case Management Services (10/2004 – 11/2005)*
- *Director, Morgan County Adult Services (09/2003 – 10/2004)*
- *Targeted Case Manager (06/2003 – 09/2003)*

Independent Case Management (03/2002 – 06/2003)

Julie served as a Targeted Case Manager for individuals receiving Medicaid 1915 (c) waiver services transitioning from State operated facilities.

Professional Assessment of Indiana, Inc. (04/2000 – 10/2001)

Julie served as a Diagnostic and Evaluation Individuals with Developmental Disabilities (IDD) Clinician to determine level of care eligibility for individuals seeking or receiving Medicaid funded services in group home and waiver settings.

Julie DuPuis, MPA

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	25 years
Certifications and Education:	Master of Public Administration with concentration in Health Care Administration, Western Michigan University Bachelor of Arts in General University Studies, Western Michigan University Fundamentals in Project Management

Overview

Julie is an outcome-driven and analytical leader with 30 years of state government experience providing comprehensive health coverage to a broad range of individuals, leading, and executing Medicaid and related programs, and improving various reporting processes. She has a strong foundation in managed care health delivery systems, including network assessments, financial oversight, compliance, dispute resolution, rate setting, program integrity controls, and automated systems development. Julie is adept at migrating Medicaid Management Information Systems (MMIS) from Legacy to an Enterprise environment.

Experience**BerryDunn (06/2022 – Present)**

- **State of West Virginia (WV)**

- **WV Department of Human Services (DoHS)**

- *Medicaid Enterprise System and Enterprise Data Solution projects 02/2022 – present)*

Julie serves the Enterprise Data Solution project as a subject matter expert supporting data profiling, testing, and requirements gathering support.

- *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project, Home and Community Based Services, Incident and Case Management System project (07/2022 – present)*

Julie serves the MES MSP project as a subject matter expert supporting requirements gathering and research support.

Michigan State University (MSU), Institute for Health Policy (IHP), Program Evaluation and Health Services Research (12/2016 – 07/2022)

Julie served as a Data Resource Analyst & Medicaid Specialist to help ensure effective management of IHP activities on policy analysis, health services research, Medicaid data, and Medicaid program evaluation activities, as well as Medicaid affiliated health programs, from start to finish. This position supported Michigan Department of Health and Human Services programs, university researchers, and other community stakeholders. Julie cultivated

collaborative relationships with program officials, demonstrated exceptional programmatic expertise, and initiated new projects and topics centered around national best practices, supported by literature reviews. She consulted state staff with compliance and data quality findings. She acquired and analyzed Medicaid data from multiple sources, acting as an honest broker for MSU on behalf of the Michigan Department of Health and Human Services, Health Services Data warehouse. She was helpful in formulating responses to Centers for Medicare & Medicaid (CMS) questions relating to independent Medicaid program evaluations, structuring data flows, documentation, and instruction relating to Medicaid eligibility and claims. She provided high-level assistance to MSU research faculty and staff in project management, planning and carrying out health service research, reporting on compliance and quality issues, provided potential data resources, interpreting data findings and trained staff on Medicaid resources, system software, and interpreting Medicaid data. Julie contributed to program evaluations, proposal/manuscript development with the aim of improving proposal structure, led projects with multifaceted teams of statisticians in describing data interpretation, and presented key findings to audiences in various presentations.

Michigan Department of Health and Human Services, Bureau of Medicaid Policy and Actuarial Services, Actuarial Division, Rates and Financial Analysis Section (09/2012 – 12/2016)

Julie served as Section Manager for the Medical Services Administration, Bureau of Medicaid Policy and Actuarial Services, Actuarial Division, Rates and Encounter Data Section. She was responsible for making capitation payments for 1.8M Medicaid members with annual expenditures exceeding \$8B. She oversaw the Medicaid expansion population (Healthy Michigan) rate structure, MMIS changes and health plan system capabilities for 600,000 new members in the first year. She migrated the Childrens Special Health Care Services, Foster Care and MI Choice (HCBS) populations from Fee for Service (FFS) environments into capitated arrangements. Acting as the Bureau's system liaison, she interacted with multiple vendors overseeing and setting priorities for system enhancements and data flows between internal state departments and external vendors. She assisted the managed care plan division in Request for Proposal (RFP) contract language relating to MMIS data flows and encounter data. She delegated and trained personnel in loading rates, calculating health plan related compliance and quality performance withholds, and monitored state budget development. Often this position led projects; defined, and enforced standard operating procedures, interacted with CMS on waiver design, contract language, evaluation reports, and capitation rate thresholds. Using literature reviews and data findings her team recommended best approaches to health plan rate setting and financial analysis, encounter data flow and quality, program change proposals, implemented value-based purchasing initiatives, and legislative bill analysis. Julie oversaw Michigan's Encounter Data Quality initiative through monitoring of complete, accurate, and timely encounter data submissions. She managed the health plan data improvement sessions in face-to-face health plan meetings and other data stakeholders. She consulted and coordinated with CMS, internal and external auditors, state agencies, health plans, providers, county health departments, health professional associations and other community stakeholders. She introduced using encounter data for the Healthy Michigan Plan Population Explanation of Benefits. She helped formulate the algorithm for calculating member premiums for members

that were over 135% Federal Poverty Level (FPL). She interacted with the actuary almost daily and other consultants to define rates, initiate system changes, policy, and contract terms.

Michigan Department of Community Health Department of Community Health, Medical Services Administration, Bureau of Medicaid Policy and Actuarial Services, Actuarial Division, Rates and Financial Analysis Section (12/1998 – 09/2012)

Julie served as a Departmental Specialist and Senior Analyst/Lead Worker. She developed professionally into a recognized resource serving as the agency expert in several substantial departmental programs. Julie assumed a pivotal role in creating, testing, and implementing the Medicaid Health Plan and other capitated program rates in the Community Health Automated Medicaid Payment System (CHAMPS). Julie developed her position as the lead, responsible in loading and maintaining Michigan's Medicaid managed care programs capitation rates, calculating managed care plan quality withholds, year-end accruals, portions of CMS-64 reporting, consulting on policy, research and respond to auditor findings, and train new staff. Julie was responsible for performing complex analysis of claims and eligibility data from multiple sources; economic research and calculated preliminary and year-end accrual estimates.

Valerie Hamilton, JD, MHA, RN

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Manager
Years of Experience Relevant to Proposed Role:	30 years
Certifications and Education:	<p>Juris Doctorate, The Ohio State University College of Law Master of Health Administration, Division of Health Services Management & Policy, College of Public Health, The Ohio State University</p> <p>Bachelor of Arts in Psychology, The Ohio State University Registered Nurse, Diploma, Providence Hospital School of Nursing</p> <p>Prosci® Certified Change Management Practitioner (CCP)</p>

Overview

Valerie, an experienced clinician, and legally trained health policy expert, has significant experience in clinical provider operations, healthcare policy, healthcare law, quality assurance (QA) and management practices, and healthcare business operations. Her previous years as a critical care nurse combined with her healthcare management experience and health policy expertise allow for unique insight into the issues that enhanced transparency is intended to address.

Experience
BerryDunn (formerly Compass Health Analytics) (04/2016 – present)

As a senior health policy manager, Valerie conducts health policy analysis, including legislative and regulatory reviews.

- **State of West Virginia (WV)**
 - WV Bureau for Medical Services (BMS) and West Virginia Children's Health Insurance Program (WVCHIP) (06/2016 – present)**
 - *General Project Manager*

As a general project manager, Valerie provides project and engagement support for mental health parity compliance monitoring including periodic mental health parity compliance reviews, ad hoc analyses, and quarterly mental health parity data collection and reporting.
- **Massachusetts Center for Health Information and Analysis (04/2014 – present)**
 - *Engagement Manager and Subject Matter Expert*

Valerie has collaborated with actuaries, programmers, and analysts to prospectively evaluate the impact of health benefit mandate bills. These evaluations include a

medical efficacy analysis and an estimate on health insurance costs, typically over five years. The reviews include:

- An Act Relative to Patient Access to (Cancer) Biomarker Testing (H1074/S689)
- An Act Relative to LGBTQ Family Building (S622): August 2023
- An Act Relative to Applied Behavioral Analysis Therapy (H1084/S617): August 2023
- An Act Providing Access to Full Spectrum Addiction Treatment Services (H2116/S1292): March 2023
- An Act Relative to Breast Cancer Equity and Early Detection (H4748/S2856): November 2022
- An Act Relative to Dual Diagnosis Treatment Coverage (H1147/S685): July 2022
- An Act to Update Mental Health Parity (H2065): July 2022
- An Act Relative to Collaborative Care (S769): March 2022
- Comprehensive Massachusetts Mandated Benefit Review: January 2022
- An Act Relative to Mental Health Providers (H1114, S1262): November 2021
- An Act Promoting Consumer Choice in Health Care (H1194 and S673): September 2021
- An Act Ensuring Access to Full Spectrum Pregnancy Care (H1196): June 2021
- An Act Relative to Preserving Fertility (H1116 and S640): June 2021
- An Act Relative to Ensuring Treatment for Genetic Craniofacial Conditions (H988): April 2021
- An Act Providing Coverage for Hearing Aids (S597): January 2021
- An Act Providing Hearing Aids for Persons with Sensory Impairedness (S540): January 2021

Promerica Health, LLC (06/2013 – 04/2014)

As the Vice President of Compliance and Communication, Valerie launched a health and wellness screening laboratory. She oversaw clinical operations, compliance, quality, accreditation, and licensing.

Prudential Financial (09/2013 – 06/2014)

As a Clinical Consultant, Valerie collaborated with other professionals to evaluate disability claims for potential and capacity for return to work based on physiological and social factors.

The Ohio State University Wexner Medical Center (2000 – 2013)

As the Legal Consultant Director of Quality/Hospital Attorney, Valerie was responsible for the continuous monitoring and improvement of quality at a satellite hospital. Valerie oversaw quality

initiatives and assisted in the preparation for JCAHO accreditation. She served as hospital attorney, reviewing lawsuits and taking call for legal questions throughout the medical center.

HeartCare, Inc. (1998 – 2000)

As the Practice Administer, Valerie was responsible for business operations and growth of an invasive cardiologist practice.

Grant/Riverside Methodist Hospitals (OhioHealth) (1992 – 1997)

- Registered Nurse – Critical Care
- Graduate Administrative Associate (Internship)/Program Coordinator

Marie LaPres, JD

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	13 years
Certifications and Education:	<p>Juris Doctor, Certificate in Health Law, De Paul University College of Law</p> <p>Bachelor of Science in Nursing, University of Michigan</p> <p>Registered Nurse, State of Illinois, Active</p> <p>Registered Nurse, State of Michigan, Active</p> <p>State Bar of Illinois</p> <p>Federal District Court, Northern District of Illinois</p> <p>State Bar of Wisconsin</p>

Overview

Marie is a State Medicaid Program subject matter expert with more than 12 years of state government experience with clinical health care and legal practice expertise. She is detail-oriented and achieves results driven outcomes through analytical thinking, decision-making, and problem-solving skills. Marie has experience with implementing innovative strategic Medicaid program initiatives with cross-team collaboration.

Experience

BerryDunn (01/2024 – present)

Marie is a senior consultant in BerryDunn's Medicaid Practice Group.

State of Michigan, Michigan Department of Health and Human Services (03/2011 – 01/2024)

During her time with the State of Michigan, Marie held the following positions:

- **State Administrative Manager (05/2014 – 01/2024)**

Marie planned and directed specialized areas of Medicaid policy development and implementation, including physician services, maternal and infant health, reproductive health, and home visiting program benefits. She was responsible for research and analysis of complex Medicaid program concepts/policies to assure compliance with federal and state legal requirements, and she developed and implemented waiver activities related to the state's Medicaid eligibility expansion, Healthy Michigan Plan Section 1115 Demonstration waiver and policy. Marie planned, convened, and chaired/attended meetings with state managed care organizations, departmental staff, providers, lobbyists, and federal agency staff. She oversaw budget and rate development for Medicaid policy initiatives related to physician services, physician

administered drugs, and new program preventive services initiatives. She directly supervised a multi-skilled team, including assigning work, reviewing work products, promoting teamwork, and fostering professional development.

- **Departmental Specialist (03/2011 – 05/2014)**

Marie served as sole staff specialist responsible for statewide Medicaid Policy for physician services benefit, including research, analysis, implementation activities, and budget oversight activities for existing and new policy initiatives. She prepared and maintained policy research documents and presentations and developed and maintained relationships with managed care entities, community stakeholders, and other government agencies. Marie implemented directives from the state legislature and the Governor's office, and she was responsible for policy benefit plan operations and compliance, working with state and federal auditors and legal authorities.

- **Medicaid Utilization Analyst (03/2011 – 05/2014)**

Marie was responsible for research and analysis of complex medical procedures and new technology in relation to recognized standards of clinical practice and current Michigan Medicaid policy coverage for reimbursement determinations. She worked Medicaid payment resolution of suspended claim processing issues and served as medical review resource to Provider Support and other members of the division. Marie conducted claims payment system logic testing for systems enhancement activities.

McLaren Greater Lansing Hospital (12/2001 – 12/2009)

As a registered nurse, Marie was a staff nurse in the inpatient critical care unit, including Surgical Intensive Care Unit and Cardiac Intensive Care Unit. She was responsible for all aspects of nursing care of critically ill patients, including post-surgical, cardiac, and infectious disease care.

Lowery and Associates (07/1998 – 12/2005)

Marie worked as an associate attorney for a civil litigation firm practicing insurance defense of personal injury claims arising from auto-truck accidents. She has experience in assisting with pretrial discovery, document production review, and analysis of medical and insurance documents in preparation for defense at trial.

Brody J. McClellan, MPA

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

Overview

Brody is an innovative consultant with 15 years of experience in Medicaid, including as a state administrator and program officer with Michigan's Medicaid Actuarial Division, Outreach and finance specialist at an academic medical center, and work as a consulting Project Lead for California's Medicaid Directed Payments. Subject matter expert (SME) in Medicaid finance with experience in program operations, Intergovernmental Transfers, Directed Payments, Pass-Through Payments, Upper Payment Limit (UPL) programs, charity donation leveraging, Graduate Medical Education programs, and encounter data management. Collaborative communicator continually focused on building relationships and promoting synergy across business lines and global units to drive positive change, cohesive, comprehensive business approaches, and enhanced profitability.

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

- State of West Virginia (WV)**

- WV Department of Human Services (DoHS) (09/2021 – present)**

- Certified Community Behavioral Health Clinic (CCBHC) Project (8/2023 - present)*
Brody serves as Medicaid finance and data SME for WV Medicaid to provide assistance in planning and implementation of new CCBHC certification and operational processes.
 - Substance use Disorder – 1115 Renewal Project (10/2023 – present)*
Brody serves as data and Medicaid financing SME for the 1115 renewal project providing assistance in planning and implementation of new 1115 waiver documentation.
 - Mobile Crisis Services Planning Project (09/2021 – present)*

Brody serves as Project Lead to create a new State Plan Amendment for WV Medicaid to provide Community Based Mobile Crisis Intervention Services.

- *Mental Health Parity Compliance Project (09/2021 – 9/2022)*
Brody served as Project Lead to annually coordinate data exchanges with contracted Managed Care Entities for Medicaid and Children's Health Insurance Program (CHIP) to help ensure compliance with federally mandated mental health parity rules.
- *Mountain Health Promise (MHP) re-procurement project (09/2021 – present)*
Brody serves as Medicaid Finance and Actuarial SME.
- *Mountain Health Trust (MHT) re-procurement project (09/2021 – present)*
Brody serves as Medicaid Finance and Actuarial SME.
- *Medicaid Enterprise Systems (MES) re-procurement project (09/2021 – 3/2022)*
Brody served as Medicaid Finance and Actuarial SME.
- **Puerto Rico Department of Health Medicaid Program (12/2021 – 6/2022)**
Brody served as Medicaid Finance and Actuarial SME on the Puerto Rico finance and policy support team.

Mercer GHSC (10/2019 – 07/2020)

Brody worked as a senior consultant with roles as project manager and Project Lead for two actuarial rates team for California Medicaid. Both teams combined were responsible for rate development with impact amounts of over \$9 Billion annually. He also served as SME on various national Medicaid Financing advising projects. As project manager and lead, he improved business operations on actuarial rates teams focused on Directed Payments and Medicaid Eligibility. His work included managing credentialed actuaries throughout rate setting cycles to produce certified rates, formal project planning creations, analysis of project process, rate setting modeling process review, documentation process review, and process engineering analysis to correct problematic projects in line with management directives. Brody was also responsible for the creation of consulting communication training to assist staff and enhance effectiveness on external debriefing and client interaction and corporate intellectual capital including Centers for Medicare & Medicaid Services (CMS) pre-print responses and program design language, financial modeling templates and writing external articles. Brody was recognized as a technical and policy specialist for Medicaid Rates and Managed Care structure; Medicaid UPL rules, and methodologies such as hospital UPL and physician UPL programs.

Independent Consultant (10/2019 – 06/2020)

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

Sellers Dorsey & Associates, LLC (10/2017 – 10/2019)

Brody worked as a senior consultant with scopes of work experience in 16 states. He advised clients including hospital systems, physician practice groups, associations and state Medicaid agencies on a variety of Medicaid subject areas, focusing on Medicaid special financing programs. He also functioned as a Health Policy Specialist, General Medicaid financial and budget specialist, and General advisor on Medicaid Waiver programs (115 waivers). He created policy documents adopted and used by state governments and developed rate analytics accepted by federal government as methodologically sound.

Michigan State University (04/2015 – 10/2017)

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

State of Michigan (12/2007 – 04/2015)

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

Emily E. McCoy, RN, BSN, PMP®

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Manager
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	Bachelor of Science in Nursing, Marshall University Registered Nurse Project Management Institute® (PMI®) Certified Project Management Professional® (PMP®) Certified Executive Coach

Overview

Emily is an experienced project manager and registered nurse with deep expertise in healthcare consulting across various areas, including mental health, long-term care, and Medicaid and Medicaid Management Information Systems (MMIS). Her clinical experience includes direct care nursing for individuals within an inpatient behavioral health environment (including substance use and eating disorders), neurology unit, and skilled nursing/long-term care setting. Emily also has several years of program management, project management, and leadership for both hospitals and state health and human services agencies.

Experience

BerryDunn (07/2016 – present). Emily serves as a senior manager in BerryDunn's Medicaid Practice Group (MPG), bringing her years of experience to state Medicaid agency clients, particularly in Centers for Medicare & Medicaid Services (CMS) certification.

- **State of West Virginia (WV)**

- **WV Department of Human Services (DoHS)**

- *Eligibility and Enrollment Implementation Assistance (01/2018 – present)*

Emily is currently the deputy project manager within the State Project Management Office (PMO), leading and providing oversight to various teams within the project, including Requirements and Design, Deliverables, Testing, Organizational Change Management, and Certification and Compliance. Emily can combine her experience and knowledge of State policy and system implementations with this unique opportunity to integrate three separate systems to improve service delivery to State citizens.

- *Public Health Emergency (PHE) (10/2021 – 7/2022)*

Emily served as a subject matter expert (SME) for the PHE "Unwinding" project. Emily's State government employment and eligibility experience allowed her the opportunity to work with the State to create a strategic plan to help it with unwinding efforts and get the policies and eligibility processes

back to a pre-COVID state once CMS determines that these PHE flexibilities will end.

- *Portfolio Coordination and Management (PCM) (11/2020 – 10/2021)*
Emily served as the project manager for the PCM project, leading a team providing project management and support services to assist with the continued establishment of PCM processes and templates to help DoHS align and manage its projects across the enterprise. Emily's State government employment experience, coupled with her knowledge of project and portfolio management, provided a valuable perspective and ability to help the State obtain its desired outcomes.
- *Enterprise Program Management Office (EPMO) Project (11/2019 – 10/2020).*
Emily served as the project manager for the West Virginia DoHS EPMO project, leading and providing oversight to a team of individuals assisting the State in the establishment of its own PMO. This project focused on leveraging and developing tools, templates, processes, and plans for the State to utilize as they begin to establish the Project Management Office (PMO) and focus on gaining adoption within the organization. Beginning in March 2020, the EPMO project began identifying projects across West Virginia DoHS that were impacted by the COVID-19 outbreak and started utilizing some of the project artifacts to navigate through project and program management during a public health emergency (PHE). This work included building upon existing vendor relationships with Optum and DXC to apply system modifications to accommodate necessary PHE actions.

- **New Jersey Division of Medical Assistance and Health Services (DMAHS)**

- *MMIS Modernization (7/2022 – 12/2023)*
Emily serves as the Engagement Manager for the Project Management Office (PMO) in collaboration with the Implementation Team Office (ITO). The MMIS Modernization is the opportunity for NJ DMAHS to update their monolithic legacy MMIS with a modular approach within the CMS guidelines. Emily is leading a team of experts in areas of project management, documentation support, deliverable review, certification support, testing support, Advance Planning Document (APD) support, Medicaid Information Technology Architecture (MITA) support, and change control.
- *MMIS Implementation and Certification Leverage and Reuse Project (04/2017 – 01/2018)*
Emily led the BerryDunn Medicaid testing team, in collaboration with the New Jersey Implementation Team Organization (ITO), for the Replacement MMIS (R-MMIS). She applied her West Virginia MMIS testing experience to the implementation of the New Jersey R-MMIS.

- **Henrico County, VA**

- *Henrico Area Mental Health and Development Services (HAMHDS) EHR System Consulting (08/2016 – 04/2017)*

Emily was a key resource on BerryDunn's team to provide Henrico with planning and procurement support for its EHR system, which incorporates behavioral and mental health, and substance abuse services. The work included requirements development, RFP development, and system selection.

West Virginia DoHS (11/2013 – 06/2016). Emily served as the Director of the MMIS for WV with overall duties involving the oversight and management of the MMIS and the contracted Fiscal Agent. In this role, she was responsible for managing several projects that would be integrated into the MMIS. Specific duties as the Director of MMIS included:

- Interpreting regulatory policy to determine possible impacts to the MMIS and other systems
- Monitoring system performance against Medicaid policies and federal regulations for compliance and reimbursement
- Oversight and management of multiple federal regulations within the MMIS, such as 5010/D.O, ICD-10, MITA, and Transformed Medicaid Statistical Information System (TMSIS)
- Participating in CMS Pilot Certification gate level reviews with CMS representatives, including presenting system evidence to meet MITA 3.0 requirements
- Participating in the development and review of the MMIS RFP
- Participating in the development and updates of various APDs, as well as seeing these documents through to approved status with CMS
- Oversight and Management of the Adult Medicaid Quality Grant
- Management of and participation in an MMIS implementation from RFP development through implementation, as well as post-implementation monitoring and defect resolution

West Virginia Bureau for Medical Services (BMS) (01/2003 – 10/2013). During her 10 years with BMS, Emily held several positions, as described below.

- *Medicaid Management Information system (MMIS) (01/2007 – 10/2013)*
Emily served as the manager of operations with the MMIS for WV with overall duties involving multiple areas of the system, including claims processing, member, and provider. She also acted as a SME in various areas of Medicaid systems, including long-term care and hospice services.
- *Office of Behavioral and Alternative Health Care (01/2005 – 12/2006)*
Emily served as Program Manager of the State Medicaid Long-Term Care Program with overall duties involving the development, implementation, and supervision of the following programs: nursing facilities, hospice, hospice in nursing facilities, home health, Pre-Admission Screening and Resident Review (PASRR Level II), and Nurse Aide Training and Competency Evaluation (NATCEP). Specific duties involved with the above-mentioned programs included interpreting regulatory policy for reimbursement, monitoring provider compliance with Medicaid policies for reimbursement, and providing formal and informal education to providers regarding State Medicaid policies and

reimbursement.

- **Office of Behavioral and Alternative Health Care (01/2003 – 12/2004)**
Emily served as a Health & Human Resource Specialist in the State Medicaid Long-Term Care Program with overall duties involving the supervision and oversight of claims processing for nursing facility reimbursement. Her duties included providing direct communication with the nursing facility provider network regarding reimbursement issues related to the Minimum Data Set (MDS), billing, and medical eligibility.

Charleston Area Medical Center (07/1996 – 12/2002)

- **Transitional Care Unit (05/1999 – 12/2002)**
 - *Clinical Management Coordinator.* Emily served in a hospital-based skilled nursing unit with overall duties involving the management of nursing and ancillary staff, as well as assisting in program administration to maintain compliance with federal long-term care regulations.
 - *MDS Coordinator.* Emily served in a hospital-based skilled nursing unit with overall duties involving the coordination of the federally mandated Resident Assessment Instrument (RAI) process.
 - *Clinical Nurse II.* Emily served on a 19-bed skilled nursing unit with overall duties involving the advocacy of residents while providing direct resident care. The focus was to provide quality, holistic skilled care to residents while complying with federal long-term care certification requirements.
- **Neuroscience Unit (01/1998 – 05/1999).** As a Clinical Nurse II, Emily served on a neuroscience unit with overall duties involving the advocacy of patients while providing direct patient care to individuals with neurological conditions. Specific duties included:
 - Performing various nursing duties including, but not limited to, preventing and / or managing altered skin integrity with patients experiencing compromised mobility as well as providing tracheostomy, gastric tube, central line, and ventilator care
 - Performing duties of temporary charge nurse, including the supervision of staff providing direct patient care and monitoring staffing patterns based on the Medicus system recommendations
 - Serving as a representative on the Standards and Practice Council and Procedures sub-committee
 - Providing formal and informal education as the unit CAD (Continuous Analgesia Device) Pump instructor and RN preceptor
 - Serving as the study coordinator for Nursing Process Quality Improvement with an additional focus placed on the study of pain management in neurological patients
- **Behavioral Health Unit (07/1996 – 01/1998).** Emily began her nursing career on the Behavioral Health Unit. Overall duties involved the advocacy of patients while providing direct patient care to individuals with mental illness.

Kitty Purington, JD

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	28 years
Certifications and Education:	Juris Doctor, University of Maine School of Law Bachelor of Arts in History and Spanish, University of Massachusetts

Overview

Kitty is a skilled Senior Consultant with nearly 30 years of experience with Medicaid. She has served in multiple leadership positions in state agencies, community organizations, and national non-profit organizations. She has a strong background in policy research and analysis, vendor and stakeholder management, and development and implementation of programs.

Experience**BerryDunn (05/2022 – present)**

Kitty serves as a Subject Matter Expert (SME) with the Medicaid projects in West Virginia (WV) and Puerto Rico (PR). As a SME, she analyzes and provides consultation on a range of state and federal Medicaid policy issues, including emerging Medicaid options and model practices for behavioral health, health-related social needs, and long-term care. Kitty has extensive experience drafting state plan documents, policy papers and summaries, technical reports, and other policy documents and research materials. Kitty participates in team meetings and client meetings, including client meetings with the Centers for Medicare and Medicaid Services (CMS), and can share information, expertise and perspective from her previous role in Medicaid policy management.

National Academy for State Health Policy (NASHP) (04/2015 – 05/2022)

As Senior Program Director, Kitty led the Behavioral Health, Aging, and Disability portfolio for NASHP, a national, non-partisan, mission-driven organization that supports state leaders in their work to improve health policy. She worked with private foundations, federal agencies, states, and partner organizations to develop and implement multiyear projects that focused on delivery system transformation, payment reform, implementation of best practices, and other policy innovations. Kitty designed and oversaw technical assistance and learning opportunities to support state policy makers in their work on numerous Medicaid topics including physical and behavioral health integration, behavioral health data and quality; behavioral health crisis systems, palliative care policy, long-term care, and value-based payment. Kitty oversaw the development and dissemination of briefs, blogs, webinars and other resources for state Medicaid, behavioral health, and long-term care officials, and facilitated meetings, webinars, and conference sessions to assist state health officials in problem solving and sharing best practices. Kitty has presented at state and national conferences on behavioral health and long-term care and has served in an advisory capacity to numerous state and federal initiatives,

including the National Academies for Science, Engineering and Medicine's Roundtable on Quality Care for People with Serious Illness, and the National Council for Community Behavioral Health Policy Committee. She supervised a team of professionals to manage grant development, contracts, budgets, and staffing.

Office of MaineCare Services (OMS) (06/2012 – 04/2015)

Kitty worked as the Program and Policy Manager of Value-Based Purchasing with MaineCare, Maine's Medicaid agency, overseeing the development, implementation, and ongoing growth and improvement of OMS practice transformation and value-based purchasing initiatives. She developed and implemented the state's Health Home regulatory framework (state plan amendments, Medicaid regulation, provider contracts, licensing and certification related to payment and provider requirements) in collaboration with OMS Office of Policy and State Attorney General's Office. Kitty worked with OMS Operations team and external vendors to implement an online portal and set of tools for primary care and behavioral health providers to support population-based care coordination, integration, and quality improvement. Kitty collaborated with internal and external stakeholders (related state agencies, providers, peer leaders, family and advocacy organizations) on program development, implementation and quality improvement; oversaw communications, including production of member materials, provider communications and technical assistance, webinars, and public forums; and developed the State Innovation Plan and behavioral health-related initiatives as part of a successful \$30 million CMS State Innovation Model grant. Kitty served as liaison post-award on projects such as HIE connectivity for Behavioral Health Home providers, learning collaboratives, and work force development, and developed the concept paper for the state's accountable care organization initiative.

NASHP (01/2009 – 06/2012)

Kitty worked as a Policy Specialist, managing NASHP activities and deliverables under a five-year project funded by the Substance Abuse and Mental Health Services Administration focused on promoting evidence-based practices for adults, older adults, and children with behavioral health needs in state Medicaid programs. She designed and fielded a comprehensive state policy survey to capture current data on state Medicaid support for Assertive Community Treatment, Supportive Housing, Medication Assisted Treatment, and other evidence-based services. She provided technical expertise and analysis on Medicaid and other state policies topics, including behavioral health, value-based purchasing, health information technology and exchange, data analytics, behavioral health privacy and confidentiality issues, and quality measurement. She also developed materials and facilitated activities to promote state learning objectives.

Community Counseling Center (01/2007 – 01/2009)

Kitty served as the Director of Government and Business Affairs for a large community mental health center. In this role Kitty identified new business opportunities and strategic initiatives for the organization, resulting in programs and partnerships to support physical and behavioral healthcare integration, school-based health centers, and pre-trial behavioral health supports for

corrections-involved women. Kitty provided ongoing analysis and information regarding regulatory, reimbursement, and policy changes at federal, state, and local level.

Maine Associations of Mental Health Services (11/2001 – 01/2007)

Kitty served as Interim Executive Director and Policy Analyst, providing leadership and strategic planning to the board of directors on a variety of issues for a statewide trade association of mental health and substance use disorder provider organizations. Her role included development of a new governance structure and bylaw changes, and planning and implementation of an annual legislative agenda. She worked with state and federal agencies in advocacy, interpretation, and development of rules, legislation, and standards pertinent to reimbursement and delivery of behavioral health services. She represented the Association in a variety of forums, including as chair of the Governor's Medicare Part D Implementation Task Force, chair of the state Medicaid Advisory Committee, and member of the Policy Committee of the National Council for Community Behavioral Health.

Legal Services for the Elderly (12/1998 – 11/2001)

Kitty worked as a Staff Attorney to provide legal counsel to low-income seniors on a variety of elder law topics such as public benefits, estate planning, healthcare coverage, and disability matters.

Sarah Renner, MPH, MBA

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	18 years
Certifications and Education:	Master of Public Health, Indiana University Master of Business Administration, University of Indianapolis Bachelor of Arts in Political Science, Hanover College

Overview

Sarah is a senior consultant in the Medicaid Practice Group. With over 20 years of state government management and consensus building experience, she has a talent for rapidly learning and mapping new and complicated information. Sarah's natural ability to listen, communicate, and collaborate, combined with her drive for results, allows her to be an invaluable asset to the states and clients that she works with. She leads and participates in improving health equity and manages sensitive and confidential information with delicacy and care.

Experience**BerryDunn (08/2022 – present)**

- **State of West Virginia (WV)**

- **WV Bureau for Medical Services (WV BMS)**

- *Behavioral Health Continuum of Care 1115 Waiver (08/2022 – present)* As a policy analyst and subject matter expert (SME) Sarah works to update the substance use disorder (SUD) implementation plan, researching and developing new service definitions and writing the Serious Mental Illness (SMI) implementation plan for Phase 1. In addition, Sarah assists in the development and negotiation of a Section 1115 Demonstration Project to undertake behavioral health delivery system transformation in WV. Through this Section 1115 Waiver, WV can test innovative policy and delivery approaches to reform systems of care for individuals with SUD and SMI.
 - *American Rescue Plan Act (ARPA) Section 9817 Home and Community-Based Setting (HCBS) Implementation Plan Project (08/2022 – present)*

Serving as project manager, Sarah oversees this project and provides subject matter expertise, and support for the design, development, and implementation of a Spending Plan and Narrative for the ARPA. The March 2021 ARPA allowed enhanced federal funding for state Medicaid spending on HCBS. The increased Federal Matching Assistance Percentage (FMAP) allowable by the ARPA allows a wide array of allowable opportunities for HCBS improvements. Providing stakeholder management and technical expertise to the State, Sarah also leads

workgroups, planning discussions and monitors controls execution of the implementation schedule.

- *Children with Serious Emotional Disorder 1915(c) Waiver (CSEDW) Development (08/2022 – present)*

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

- **Minnesota Department of Human Services (DHS)**

- *Program Analysis of Implementation of a Program of All Inclusive Care for the Elderly (PACE) Program (09/2023 – present)* Sarah currently serves as a SME for a project to help DHS analyze options for the implementation of PACE. In this role, Sarah designed an analysis of existing programs, contributes to stakeholder engagement, and assists with the development of project deliverables.

Indiana Family and Social Services Administration (FSSA) (02/2018 – 08/2022)

Sarah served as the Director of Division of Aging to co-Chair FSSA long-term services and support reform workgroup to increase the number of people living in a HCBS, supported by an integrated data environment, and focusing on caregiver training and supports. She participated in developing a Managed Long-Term Services and Supports (MLTSS) design book, responses for information (RFIs), and requests for proposals (RFPs), and expedited eligibility process and consumer engagement forums. She designed and implemented Indiana's first caregiver survey to assess caregiver awareness, supports needed, financial hardships, and health status, and also led COVID-19 response efforts for the Division which included development of the Essential Family Caregiver long-term care facility guidance, Area Agency on Aging (AAA) vaccine registration project, Homebound Hoosier Project, high-risk participant emergency planning project, Admission, Discharge, and Transfer (ADT) data sharing project between dual special needs health plans (DSNP) and AAAs, and caregiver supports awareness campaign. She oversaw the Aged and Disabled and Traumatic Brain Injury (TBI) waivers specifically focusing on rate methodology and rate setting, health care integration services, and structured family caregiving to enhance home and community-based services for older adults, persons with physical disabilities, and TBIs. She helped to ensure Indiana's State Unit on Aging follows the Older Americans Act, the HCBS Settings Rule and collaborates with the Indiana Department of Health Long-Term Care Division while focusing on long-term care options that enhance choice, equity, and quality of life. Sarah optimized the Adult Protective Services Program (APS) by focusing on improving the case management system, reducing burdensome financial approvals, and designing collaboration opportunities for APS Units and social service programs.

She also supported the Division's leadership in developing the Indiana Dementia Task Force focusing on workforce training, health care integration, and caregiver supports.

Myers and Stauffer, LC (10/2015 – 02/2018)

Sarah served as a Senior Manager in Consulting to lead internal team working on the Idaho Department of Health and Welfare (DOHW) Patient Centered Medical Home Incentive Payment Accounting System (PCMH I-PAS) which required information system, dashboard, progress measure, incentive payment, and recoupment design development. She managed project budget, invoicing, and financial reconciliation, and led the New Jersey Department of Health (DOH) implementation of the Delivery System Reform Incentive Payment (DSRIP) program, a demonstration program designed to result in better care for individuals and populations and lower costs by transitioning payment to incentive outcome attainment. She also managed staff, budget, and contract deliverables, and oversaw Databook updating, payment generation, performance measure results reporting, learning collaborative presentations, progress report reviews, and client relationships. She participated in the New Hampshire DOHW implementation of the DSRIP Independent Assessor and Learning Collaborative projects which included designing technical assistance and training tools for Independent Delivery Networks (IDNs), developing project plan evaluation tools, evaluating project plans, and providing training and technical assistance to IDNs during the project plan development phase.

Indiana DOH (IDOH) (07/2005 – 10/2015)

- *Director for Women, Infants and Children (WIC) (02/2010 – 10/2015)*
Sarah optimized \$150 million in supplemental food and nutrition services serving 280,000 woman, infants, and children through 140 clinics and 700 grocery stores and pharmacies. She implemented policy changes balanced by cost containment and nutritional need for WIC's food package revisions for prenatal, postpartum, and breastfeeding women, infants and children. She provided leadership to WIC's transition to a new information system that provides Electronic Benefits Transfer (EBT) instead of checks; enhanced WIC clinic staff performance optimization by developing Outreach and Business Development training targeting relationship-building with medical offices and hospitals; and developed WIC's first quarterly benchmarking system for local agencies administering WIC services. She consensus-built with clinic staff to implement the Loving Support Model to increase lactation rates and improve health status of WIC participants, and managed The Emergency Food Program (TEFAP), provided strategic and financial planning for Indiana's infant mortality media campaign, and led stakeholders through budget reductions due to sequestration and federal government shutdown.
- *Director, HIV/STD/Adult Hepatitis (09/2008 – 02/2010)*
Sarah managed \$26 million state and federal dollars to build linkages between HIV/AIDS prevention, services and surveillance with STD, Hepatitis, Tuberculosis (TB), Immunization and Substance Use strategies. She collaborated with Indiana State Department of Health (ISDH) Laboratory to help ensure infection disease test results were transmitted to local health departments, community-based organizations, and Department of Corrections.
- *Deputy Assistant Commissioner (07/2005 – 09/2008)*

Sarah supervised and provided leadership to the following Divisions: Primary Care Office, Healthy Homes, HIV/STD/Hepatitis, Chronic Disease, Immunization, and TB. She developed and implemented operational policies and business processes for the Commission, coordinated Commission budget, legislative proposals, and performance metric projects, and served as Flood Relief Coordinator for ISDH during 2008 disaster.

Meghann Slaven

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Manager
Years of Experience Relevant to Proposed Role:	12 years
Certifications and Education:	Bachelor of Science in Journalism, Ohio University Bachelor of Fine Arts in Performance & Choreography, Ohio University

Overview

Meghann is a manager with BerryDunn's Medicaid consulting practice focused on helping state health and human services agencies achieve their project objectives. She brings value to every project and project team through her ability to provide effective system procurement, implementation, and operations management, project management, quality management, and program leadership. Meghann has worked on multiple projects supporting critical initiatives for the West Virginia (WV) Bureau for Medical Services (BMS).

Experience

BerryDunn (10/2017 – present)

Meghann serves as a manager with BerryDunn's Medicaid Practice Group (MPG), helping to provide project oversight, execution, and control for a multitude of projects and initiatives.

- **State of West Virginia (WV)**

WV Department of Human Services (DoHS)

- *Medicaid Enterprise Data Solution Implementation and CMS Certification Project (10/2019 – present)*

As a project manager, Meghann assists the client with management and facilitation of pre- and post-procurement activities, including evaluation training, procurement schedule monitoring, proposal evaluation processes, and solution implementation activities. Meghann is responsible for the management of project objectives and resources and serves as a primary point of contact for project constraints that require escalation. Meghann tracks the budget, project status, risks, and issues; she develops monthly status reports and mitigation strategies to keep the client informed and to help ensure the project meets its goals and objectives. Meghann drives milestone completion with consistent outreach to stakeholders and close monitoring of the project schedule and timeline. Additionally, Meghann assisted the project team in developing a Data Governance Roadmap.

WV BMS

- *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (11/2021 – present)*

As Deputy Project Manager, Meghann is responsible for the management of project objectives, resources, and constraints (scope, schedule, cost, and quality). WV was selected by the Centers for Medicare & Medicaid Services (CMS) and MITRE as a pilot state to test the Outcomes-Based Planning (OBP) process. Meghann led this key initiative for WV by supporting the facilitation of the OBP Pilot through activities such as monthly workgroup meeting facilitation, assessment of the current MES environment, identification of challenges and opportunities, and development of MES goals, outcomes, and metrics. Meghann tracks the budget, project status, risks, and issues and develops monthly status reports and mitigation strategies to keep the client informed and to help ensure the project meets its goals and objectives.

- *WV Managed Care Organization (MCO) Encounter Data Quality (EDQ) Assistance Project (09/2020 – 02/2021)*

As a business analyst, Meghann provided guidance and assistance to the project management team with research developing deliverable templates and content, including a Best Practices Research Summary and Data Strategy Roadmap.

- *Medicaid Information Technology Architecture (MITA) State Self-Assessment (SS-A) Maintenance (08/2020 – 04/2021)*

As a business analyst, Meghann provided guidance and assistance to the project management team to update the WV's MITA 2018 Health Information Technology (HIT) Companion Guide Report.

- *Enterprise Program Management Office (EPMO) Project (07/2019 – present)*

As a business analyst, Meghann assists WV in developing and updating its annual HIT and HIE Advance Planning Document (APD), helping the client gain over \$9 million in federal funding for HIT activities and initiatives.

- *Data Visioning and Warehouse Development and Procurement Assistance Project (10/2017 – 09/2019)*

Meghann supported the Data Visioning and Warehouse Development and Procurement Assistance Project, a project focused on supplying project management services to WV to assist with the integration of data sources, systems, and databases within BMS. As a project coordinator, Meghann developed agendas, captured meeting notes, tracked action items, and supported the development of key project deliverables. Meghann managed the development process and contributed to the following deliverables: monthly status reports; Data Warehouse Decision Support System (DW/DSS) Request for Proposal (RFP); Implementation Advance Planning Document Update (IAPDU); Requirements Traceability Matrix (RTM); proposal evaluation packets; test scenarios; capstone data source integration roadmap; and project closeout. She was responsible for managing client repositories, including 200+ data dictionaries and 450+ data sharing agreements. Meghann also developed MS Visio process flows to document client data sharing practices.

- *Gap Analysis and Project Management Services (10/2017 – 06/2018)*

As a project coordinator, Meghann developed agendas, captured meeting notes,

tracked action items, and supported the development of the capstone project deliverable. As part of a team analyzing over 2,600 impacts from the Affordable Care Act (ACA) on WV Medicaid's policy, systems, and business processes, Meghann assisted with research, writing, and assessment activities to support the development of a compliance gap analysis deliverable.

- **Puerto Rico Medicaid Program (PRMP)**

- *Puerto Rico Medicaid Management Information System (PRMMIS) Project (11/2020 – 12/2020)*

As a subject matter expert (SME), Meghann provided guidance and assistance to the project management team to update PRMP's MMIS APD and corresponding federal funding documentation.

WV School Service Personnel Association (11/2014 – 10/2017)

As a public relations specialist, Meghann was responsible for developing advocacy campaigns, monthly newsletters, press releases, public service announcements and speeches. She was also responsible for social media management including Facebook, Twitter and LinkedIn; conference planning and logistics; media relationships; and lobbying for association and partner associations.

College Summit (04/2011 – 07/2014)

Meghann served as the school partnership manager, providing consulting and management of College Summit program to partner schools in WV. She trained and supported educators in delivery of College Summit curriculum and online tools; met with school counselors, educators and administrators on a bimonthly basis to help ensure school performance according to milestone achievement; guided students through processes to help ensure postsecondary success; and facilitated meetings to track progress and share data measurement and analysis.

University of Charleston (10/2006 – 03/2011)

During her time with the University, Meghann held the following positions:

- *Assistant Director of Admissions (08/2008 – 03/2011)*

Meghann assisted the Admissions Director in development of enrollment plan, developed geographical recruitment plan for admissions representatives, and trained and managed admissions representatives.

- *Admissions Representative (10/2006 – 08/2008)*

Meghann was responsible for recruitment in specified territory. She served as a University representative at recruitment events, as well as evaluated applicants, facilitated the admissions process, counseled students and families on financial aid, and assisted in implementing enrollment activities.

Clay Center for the Arts and Sciences (08/2005 – 09/2006)

As a group reservations coordinator, Meghann scheduled group visits to Avampato Discovery Museum, Clay Center, and WV Symphony Orchestra. She was responsible for maintaining and analyzing the database regarding group attendance, and assisted with museum programs and special events.

American Dance Festival (06/2004 – 07/2004)

As a press and marketing intern, Meghann developed and distributed press releases and public service announcements and coordinated visiting critic events.

A. “Nicole” Spears, MBA

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consulting Manager
Years of Experience Relevant to Proposed Role:	15 years
Certifications and Education:	Master of Business Administration, focus in Healthcare Management, Western Governors University Bachelor of Science in Corrections, University of Indianapolis

Overview

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

Experience

BerryDunn (07/2021 – present)

- **State of West Virginia (WV)**

- **WV Department of Human Services (DoHS)**

- *Business Integration Portfolio Management (07/2023 – present)*

Nicole serves as the Portfolio Manager, currently overseeing several Medicaid MES business integration projects covering organizational excellence, Medicaid Learning Center, data improvement, enterprise system implementation, Medicaid Enterprise System strategic planning and procurement, and MITA SS-A. In her role as principal/portfolio manager, Nicole helps ensure commitment of the BerryDunn project team members, high quality deliverables and other work products, maintains relationships with state leaders, and develops new scopes of work based on client project requests.

- *Managed Care Program Management (06/2022 – 06/2023)*

Nicole served as the program manager for the managed care related projects under the enterprise portfolio management structure. Nicole provides oversight to the project managers of projects including the Mountain Health Promise (MHP) Procurement Assistance, Mountain Health Trust (MHT) Procurement Assistance, Mental Health Parity, WV Children’s Health Insurance Program (CHIP) MCO Transition, and Maximum Out-of-Pocket (MOOP) projects. Nicole worked with each of the project teams to help ensure adequate staffing was available throughout the project, project milestones were met, and solutions were reasonable and viable

options for the client. Additionally, she provided executive-level communications regarding project progress, risks, issues, and key decisions.

- *MHP Re-Procurement Project (11/2021 – 09/2023)*

As project manager, Nicole assisted the client with management and facilitation of MCO procurement activities for MHP, including Request for Proposal (RFP) development, proposal response evaluation, and project tracking. Nicole tracked the budget, project status, risks, and issues, developed monthly status reports to keep the client informed, and helped ensure the project meets its goals and objectives.

WV Bureau for Medical Services (BMS)

- *MES Incident and Case Management System (ICMS) Procurement Assistance Project (11/2022 – present)*

As project manager, Nicole assists the client with procurement planning activities. Nicole tracks the budget, project status, risks, and issues, develops monthly status reports to keep the client informed and helps ensure the project meets its goals and objectives.

- *MHT Re-Procurement Project (03/2022 – 06/2023)*

As project manager, Nicole assisted the client with management and facilitation of MCO procurement activities for MHT, including RFP development, proposal response evaluation, and project tracking. Nicole tracked the budget, project status, risks, and issues, developed monthly status reports to keep the client informed, and helped ensure the project met its goals and objectives.

- *MES Modernization Strategy and Procurement (MSP) Project (07/2021 – present)*

As project manager, Nicole assists the client with development of a modernization strategic plan, procurement planning activities, and providing subject matter expertise on MES. Nicole tracks the budget, project status, risks, and issues, develops monthly status reports to keep the client informed and helps ensure the project meets its goals and objectives.

- *Managed Care Encounter Data Quality Project (07/2021 – 02/2022)*

Nicole worked as a subject matter expert (SME) assisting with the transition of managed care encounter claims from a proprietary format to electronic data interchange (EDI). For this project, she developed a SDLC Coordination Plan to review and prioritize BMS enterprise system updates.

Gainwell Technologies (formerly DXC Technology) (12/2017 – 07/2021)

Nicole worked as a senior business advisor for the Member Management Module Team as Kansas developed a new modular Medicaid Management Information System (MMIS). The Member Management Module includes Member Eligibility, Medicare Management, Eligibility Verification Systems (EVS), and Early and Periodic Screening, Diagnosis, and Treatment (EPSDT). Nicole also led the Business Analysts in the module and produced the end products User Interface (UI) design, role-based access security (RBAC), all system documentation for her subsystems (Design Expectations Document, Detailed System Design, Business Design Documentation, etc.), led her subsystem through the Medicaid Enterprise Certification Toolkit (MECT), and provided subject matter expertise for testing and training.

SR Advise (01/2016 – 12/2017)

Nicole worked as a director and account manager to provide creative, strategic, and executive services to clients within the healthcare marketing space. She developed and implemented operational plans and strategies to meet clients' individual business objectives and focused on improving organizational performance through enhanced business processes and management strategy planning. Nicole spearheaded a new internship program and business growth in the public health arena. She also directed RFP response development, including coordination with both sub and prime vendors. Her efforts resulted in adding several new clients and contracts valued at over \$2 million in her short time with the company.

SVC, Inc. (07/2012 – 12/2015)

Nicole worked as the director of business development and a senior health policy advisor as a systems and managed care SME. She managed high-profile, complex program and system implementations reporting to and advising senior leadership. Nicole assisted in the development of key Medicaid pilot programs, including ones developed to serve as Affordable Care Act (ACA) Medicaid expansion vehicles, by identifying potential operational and implementation impacts and proposing best practices. Nicole also identified areas of opportunity and recommended strategies for process improvement for clients' established programs through the consideration of potential impact(s) of policy and programmatic changes on operations, systems, and vendors. Nicole also led non-financial business operations and business development for the company, including business development and procurement, hiring and onboarding of staff, website management, and office operations.

State of Indiana (07/2008 – 04/2012)

- *Medicaid Technical & Systems Integration Manager (02/2011 – 04/2012)*
Nicole worked as the technical & systems integration manager in the Office of Medicaid Policy & Planning to manage, approve, and track Indiana Medicaid system changes and help ensure successful integration with vendors. She directed relationship and project management, including leading staff and team members through new initiatives and constant change. As the Managed Care technical SME with extensive knowledge of both the MMIS and vendor systems, Nicole helped establish and design the new SDLC change control board. This team oversaw scope and budget, helped ensure requirements and design served business needs, and provided the opportunity for improved system integration by giving vendors a voice at the table. In this role, she also directed staff in executing audits and quality control on MMIS and MCO systems changes & MCO performance reporting to help ensure vendor compliance. She was also a key stakeholder in Indiana's initiative to determine its response to the ACA and recommended actions to the unit's compliance team on contractual delinquencies.
- *Board Director (08/2010 – 02/2011)*
As Board Director of the Professional Licensing Agency (2010 to 2011) Nicole managed staff operations, including establishing & achieving group goals and helping to ensure training and employee growth. She established strong relationships with related organizations and governing bodies in which boards had a stake and resolved board issues, including bringing boards into federal compliance and developing new compliancy division.

- *Medicaid Policy & Procedure Analyst (07/2008 – 08/2010)*

As Policy & Procedure Analyst in the Office of Medicaid Policy & Planning (2008 to 2010) Nicole directed the project implementation, policy development, and program management of Governor Daniel's 1115 waiver program, HIP. She served as the technical resources liaison between vendors and program management with extensive knowledge of the state's Medicaid systems. In this role, she oversaw SDLC and policy impacts for all large initiatives impacting the Managed Care Unit. Nicole also oversaw seven vendors, which included the development of program manuals, dashboards, and on-site review processes to help ensure contractual and regulatory compliance of four MCOs.

Keystone Builders (04/2005 – 07/2008)

Nicole worked as a new homes sales consultant to assist clients with building new residential real estate properties. She managed all Indiana communities and launched the "On Your Lot" Division. This role included overseeing vendors and sales assistants and managing all customer sales. Nicole directed sales operations resulting in the two most profitable years in the state for the builder, achieving 300%+ higher profit over prior years.

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

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Manager
Years of Experience Relevant to Proposed Role:	10 years
Certifications and Education:	Master of Public Policy and Management, University of Southern Maine Edmund S. Muskie School of Public Service, Concentration in Policy Analysis Certificates of Graduate Study: Applied Research and Evaluation Methods, Performance Management and Measurement, and Social Policy Analysis Bachelor of Arts in Political Science and History, University of Maine at Farmington Project Management Institute (PMI) Certified Project Management Professional (PMP®) Prosci® Certified Change Practitioner (CCP) Certified Lean Six Sigma Green Belt (LSSGB)

Overview

Ethan is a senior manager for our Government Consulting Group with progressive healthcare system experience across the breadth of the Medicaid enterprise. His specialties include 1115 and 1915(c) waivers, Medicaid state plans, federal health programs and legislation, health policy and program development, strategic planning, analysis, remediation, and implementation. An experienced project manager in both Medicaid Health Information Technology (HIT) and policy projects, Ethan has engaged in leadership roles in projects designed to evaluate project, program, and provider performance. These efforts have been inclusive of providing support with determining the implications of, and advising on, federal regulation, design of waiver programs, data collection, managed care compliance, waiver evaluation design, and reporting requirements.

Experience
BerryDunn (07/2014 – present)

Ethan has worked across practice areas for BerryDunn's Government Consulting group. Project highlights include the following.

- **State of West Virginia (WV)**

- **WV Bureau for Medical Services (BMS)**

- American Rescue Plan Act (ARPA) Section 9817: HCBS Implementation Project (05/2021 – present)

Serving as program manager and lead, Ethan oversees this project and provides

subject matter expertise, and support for the design, development, and implementation of a Spending Plan and Narrative for the ARPA. The March 2021 ARPA allowed enhanced federal funding for State Medicaid spending on HCBS. The increased FMAP allowable by the ARPA allows a wide array of allowable opportunities for HCBS improvements. Providing stakeholder management and technical expertise to the State, Ethan led the writing of the initial spending plan which unlocked an estimated \$558 million in increased funds for WV. The project continues in the implementation stage where Ethan leads workgroups, planning discussions and monitors controls execution of the implementation schedule.

- *WV Certified Community Behavioral Health Center (CCBHB) Project (07/2021 – present)*

As portfolio Manager Ethan oversees a BerryDunn team working to create a new State Plan Amendment for WV Medicaid to implement new and expanded health and behavioral health services. Specifically, CCBHCs are a specially designated clinic that provides a comprehensive range of mental health and substance use services.

- *ARPA Section 9813: Mobile Crisis Grant Project (07/2021 – present)*

Serving as program manager, Ethan oversees this project and provides subject matter expertise and support for the design, development, and implementation of a State Plan Amendment to add a Mobile Crisis Program to the WV Medicaid Program. As part of this, Ethan participated in writing and planning assistance for the ARPA State Option to Provide Qualifying Community-Based Mobile Crisis Intervention Services. In organizing the response, writing the application, and assisting BMS in communications to CMS, the team helped BMS in the successful award from CMS to the State of an \$847,527 grant to implement qualifying community-based mobile crisis intervention services. Currently the work involves ongoing design and implementation activities.

- *State Plan Review and Support (SPRS) Project (03/2020 – present)*

In order to help the State achieve federal compliance, Ethan oversaw a BerryDunn team of eight that compiled over 2,000 existing Medicaid State Plan pages and documents. These documents were inclusive of the State Plan sections, attachments, supplements, and amendments from both digital (State and federal) as well as physical repositories. Ethan also provided subject matter knowledge on advanced workflow designs to assist BMS in remediating compliance issues in the State Plan; developing a process flow for State Plan development, approval, and maintenance; and training State stakeholders on the new process flow.

- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (06/2019 – 10/2021)*

As program manager, Ethan oversaw a team that assisted DoHS in meeting compliance with the requirements of the MITA 3.0 State Self-Assessment as prescribed by CMS. The objective of this project was to assist the DoHS with

MITA lifecycle maintenance activities, including preparation of the MITA 3.0, SS-A Annual Update for Federal Fiscal Year (FFY) 2018, enterprise-wide MITA support for ongoing system and business process improvement projects, and training efforts to support activities related to the annual update.

- *Children with Serious Emotional Disorder 1915(c) HCBS Waiver (CSEDW) (09/2018 – present)*
As project manager, Ethan plans and executes the design, negotiation, and implementation of a Medicaid HCBS waiver program. The CSEDW provides services that are additions to Medicaid State Plan coverage for CSED who are enrolled in the CSEDW program. The CSEDW permits WV to provide an array of services that enables children who would otherwise require institutionalization to remain in their homes and communities. In addition, it is anticipated that this waiver will reduce the number of children housed both in State and out-of-State in Psychiatric Residential Treatment Facilities (PRTFs) and shorten the lengths of stay for children who require acute care in PRTFs.
- *Technical Assistance and Program Support Project (11/2018 – present)*
Serving as the overall program manager and subject matter expert Ethan oversees a project as which provides project management, subject matter expertise, and support activities for the design, development, and implementation of multiple Medicaid business initiatives and activities that BMS may undertake. Ethan and his team perform services including, but not limited to, program research, financial analysis and modeling, waiver construction, regulatory analysis, federal and stakeholder negotiation, and program development.
- *Substance Use Disorder (SUD) Waiver Initiative Project (02/2016 – present)*
Working as the lead policy analyst and subject matter expert for Phase 1 of the SUD project, Ethan assisted in the development and successful negotiation of a Section 1115 Demonstration Project to undertake SUD delivery system transformation efforts in WV. Through this Section 1115 Waiver, WV can test innovative policy and delivery approaches to reform systems of care for individuals with SUD. Serving as the data management lead for Phase 2 of the project, Ethan worked to design tools to assist in performance management and measurement, including executive dashboards and quality metrics. In addition, Ethan led reporting efforts and designed processes to conduct actuarial analysis of required budget neutrality components of WV's program. Serving as program manager for Phase 3 of the project, Ethan oversees the project manager and leads. In addition to ongoing implementation of managed care services, reporting requirements, and data analysis to support decision-making, Ethan oversees network adequacy assessments and other efforts to help ensure quality program design.
- *Third-Party Liability (TPL) Options Analysis Project (07/2018 – 12/2018)*
As project manager, Ethan determined the research design and methodology to perform an analysis of TPL options. As part of this, the team Ethan led investigated both solution and financing alternatives for the State to conduct their

Health Insurance Premium Payment program and Medicaid buy-in programs through new and innovative approaches.

- *Gap Analysis and Project Management Services (GAPMS) (10/2016 – 06/2018)*
As project manager, Ethan planned and led the execution of a large-scale ACA compliance effort across WV's Medicaid Enterprise. He provided stakeholders with detailed policy analysis and research deliverables as part of comprehensive support during the life of the project and oversaw the design and inauguration of seven subprojects created under GAPMS.
- *Adult Quality Measures Grant Project (06/2016 – 12/2016; 06/2017 – 12/2017)*
As project manager, Ethan oversaw a team tasked with collecting and reporting the Medicaid Adult Core Set Measures as BMS transitioned from a grant-funded Quality Unit to a State-supported Quality Unit.
- *ICD-10 Transition Planning and Implementation (07/2014 – 02/2016)*
As policy analyst and project coordinator, Ethan analyzed and remediated 78 distinct policies and overhauled the Provider Manual and Medicaid policy for the agency. He oversaw testing design, system integration testing, and user acceptance testing, along with client acceptance. In addition, he designed, researched, and constructed ICD-10 training modules for BMS staff; designed and built training segments for Medicaid providers and assisted with outreach and engagement; and performed analysis of Medicaid claim data processed through the MMIS to determine financial health and parity in claim operations.
- *Utilization Management and Prior Authorization Services RFP Development Project (09/2015 – 12/2015)*
As business analyst, Ethan was brought in to organize and complete the final development of a State Medicaid agency project to develop a major RFP to select a utilization management vendor.

WV Bureau for Children and Families

- *Project Management for Enterprise Content Management (ECM) Project (08/2015 – 02/2016)*
Ethan served as interim project manager on a quality assurance project to oversee the implementation of an ECM solution. He participated in joint application design sessions, coordinated State IT vendors, served as a liaison with multiple State agencies, and facilitated a smooth implementation.

- **Minnesota Department of Human Services (DHS)**

- *Program Analysis of Implementation of a PACE Program (09/2023 – present)*
Ethan currently serves as the project manager for a project to help DHS analyze options for the implementation of a PACE program. In this role, Ethan designed an iterative project approach, oversees the development of project deliverables, and directs project work for a team of five. In addition, Ethan serves as primary point of contact with DHS for project management and provides responsibility for quality of all final project deliverables.

- **Delaware Division of Medicaid & Medical Assistance**

- *Advance Planning Document (APD) Consulting (05/20221 – present)*

As project manager, Ethan leads a team focused on helping the State of Delaware continue to transform their Medicaid Enterprise Systems through the design and development of innovative APDs. As part of this, he oversees analysts, financial modeling, cost allocation, and project management tasks in support of a portfolio of over a dozen APDs annually.

- **Puerto Rico Department of Health (PRDoH)**

- *State Plan Support – (12/2020 – 10/2021)*

In order to support the Puerto Rico Medicaid Program (PRMP), Ethan served as a Subject Matter Expert for BerryDunn's State Plan work. In this role, Ethan researched and analyzed the Medicaid State Plan, drafted amendments, and reviewed State Plan materials. Ethan's work included analyzing state plan provisions related to Hospital Based Presumptive Eligibility (HBPE), Modified Adjusted Gross Income (MAGI), and other major eligibility provisions of the State Plan.

- **Nebraska Department of Motor Vehicles**

- *Consulting Services to Assist in the Modernization of a Vehicle and Title Registration System (11/2015 – 02/2017)*

As a business analyst, Ethan facilitated stakeholder outreach and engagement, conducted a current State assessment and gap analysis, led requirements definition and planning sessions, and designed, wrote, and revised an RFP for a new Vehicle Title and Registration System.

- **Michigan Department of Education**

- *Early Childhood Data Governance Structure (03/2016 – 06/2016)*

As a business analyst for the Department's data governance project, Ethan developed and drafted initial versions of key deliverables including the data governance manual and data governance policy. He mapped and developed workflows to outline the progression and flow of data throughout the agency, and outlined critical data questions and paths through which these could be resolved.

- **Colorado DHS**

- *Child Care Tracking System (CHATS) Needs Assessment and RFP Development (07/2014 – 10/2014)*

Ethan supported BerryDunn's team in conducting a needs assessment and options analysis for a new childcare tracking system for the Colorado DHS. As part of this project, he researched and analyzed State policy and vendor solutions and supported analysis of future system costs and impacts.

Liz Vose, MPA

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	11 years
Certifications and Education:	Master of Public Administration in Finance & Information Management, Rockefeller College of Public Affairs & Policy Bachelor of Arts in French Literature and Language, Skidmore College

Overview

Liz is a Senior Consultant with a strong understanding of state government oversight of Medicaid managed care compliance. She has 11 years' experience in regulatory/policy environment at the crossroads of government and managed care plans, as well as demonstrated success in managing government regulatory and communications activities for New York State and on a national scale. She has a successful history in engaging internal and external stakeholders to promote Medicaid initiatives.

Experience

BerryDunn (02/2022 – present)

Liz is a senior consultant with BerryDunn and has served as a Program Manager for State procurement projects that span procurement of Asset Verification Systems, Medicaid Enterprise Systems, and Incident Case Management Systems. Project work includes:

- **State of West Virginia (WV)**

- **WV Department of Human Services (DoHS) (07/2022 – present)**

- *WV Mountain Health Promise (MHP) Re-Procurement Project (07-2022-09/2023)*

Liz served as the Medicaid Project Manager and Managed Care Subject Matter Expert (SME).

- *WV Mountain Health Trust (MHT) Re-Procurement Project (07/2022-06/2023)*

Liz served as the Medicaid Project Manager and Managed Care Subject Matter Expert (SME).

- *WV Mountain Health Trust Phase II (11/2023- present)*

Liz serves as the Medicaid Project Manager and Managed Care SME

- *WV Legislative Implementation Assistance Project (LIAP) (09/2023-10/2023)*

Liz served as the Medicaid Project Manager.

- *WV Certified Community Behavioral Health Center Project (CCBHC) (06/2023- present)*

Liz serves as a Medicaid Managed Care SME working to create a new State Plan Amendment for WV Medicaid to provide health and behavioral health services.

- *WV Substance Use Disorder (SUD) Waiver Initiative Project Phase V (05/2023- present)*

Liz serves as a Medicaid Managed Care SME for the project designed to make Pre-Release services available to individuals released from incarceration or jail under an 1115 waiver authority.

Mercer Government Human Services Consulting (04/2019 – 05/2021)

Liz worked as a Senior Government Consultant to assist state governments on a national scale implementing Medicaid programs and stakeholder engagement initiatives. She established Medicaid compliance programs for states that comport with federal regulations, drafted, and presented Requests for Proposals (RFP) to secure funding for future contracts, and developed platform to assist state governments in tracking and trending compliance issues over time. She worked with Finance, Policy, Clinical and Operations teams to offer comprehensive consulting services for state governments.

NYS Office of Mental Health (12/2013 – 03/2019)

- *Acting Deputy Director, Division of Managed Care (10/2018 – 03/2019)*

Liz supported the Associate Commissioner for the Division of Managed Care in overseeing behavioral health managed care operations spanning analytical, policy, stakeholder engagement, and compliance workflows.

- *Director of Compliance and Communications (05/2015 – 03/2019)*

Liz worked in the Division of Managed Care to oversee a team of regulators on managed care plan compliance with Medicaid Model Contract. She oversaw stakeholder engagement activities including but not limited to public presentations, road shows, social media activities, and was responsible for the development and approval of internal policies and procedures and external communications including press releases and newsletters. She liaised with federal and state governments and the private sector to establish standards that comply with regulatory guidelines. She was promoted to Interim Deputy Director prior to departure.

- *Project Manager (12/2013 – 04/2015)*

Liz managed the implementation of an unprecedented Medicaid managed care program in NYS. She collaborated internally and with three external state agencies to achieve common implementation goals, and guaranteed timelines were tracked, and risks were communicated to executive staff as well as the Governor's office.

SUNY Albany (09/2011 – 12/2013)

Liz served as a Budget Analyst to manage Income Fund Reimbursable (IFR) accounts with net worth of \$9 million U.S. dollars. She conducted fiscal analyses including running quarterly projections and year-end activity reconciliation for a variety of accounts and funds and worked with account managers to identify and resolve fiscal inconsistencies.

HAVE Inc. (04/2007 – 08/2009)

Liz served as Accounts Payable Manager to process invoices, present payable activity to CEO, and manage credit card reconciliation process.

New York & Company (09/2002 – 08/2005)

Liz served as an Assistant Buyer responsible for skirts business. She monitored sales activities against projected on a daily, weekly, quarterly, and annual basis and presented findings to CEO. She also worked closely with design, sourcing, and marketing to help ensure trend right silhouettes hit the stores on time and generated targeted revenue.

Dawn Webb, BSHL, CPC, COC, Prosci® CCP, LSSGB, PMP®

Proposed Project Role:	Lead Project Manager
Role at BerryDunn:	Manager
Years of Experience Relevant to Proposed Role:	12 years
Certifications and Education:	<p>Bachelor of Science in Healthcare Leadership, Wheeling Jesuit University</p> <p>Associate in Applied Science, Office Administration, West Virginia University</p> <p>Certified Project Management Professional® (PMP®)</p> <p>Prosci® Certified Change Practitioner (CCP®)</p> <p>Certified Professional Coder, American Academy of Professional Coders (CPC)</p> <p>Certified Outpatient Coder, American Academy of Professional Coders (COC)</p> <p>Lean Six Sigma Green Belt (LSSGB) Certification</p>

Overview

Dawn is a manager in BerryDunn's Medicaid Practice Group, providing leadership and project management to West Virginia's Medicaid Information Management System (MMIS) and policy unit projects. She has 30 years of experience in medical claims processing and revenue cycle management, including 12 years of experience in MMIS, state Medicaid programs and policies, and requests for federal funding, such as the development of Advance Planning Documents (APDs).

Experience

BerryDunn (08/2017 – present)

Dawn works with state Medicaid agency clients and currently serves on the project team based in Charleston, West Virginia.

- **State of West Virginia (WV)**

- **WV Bureau for Medical Services (BMS)**

- Client & Engagement Operations Program Manager (01/2024 – present)

As client and engagement operations manager, Dawn provides engagement support in process improvement, best practices, staffing allocations, and project managers for the WV Engagement. Dawn also provides project oversight for the following projects: *Payment Error Rate Measurement (PERM)* (05/2018 – present)

- *APD Consulting Services* (05/2023 – present)
 - *Partnership Management Support* (December 2023 – present)

- Quality Improvement Initiatives Portfolio Manager (05/2019 – 01/2024)

As quality improvement initiatives portfolio manager, Dawn provides project

support in the areas of process improvement, best practices, and staffing allocations for the Fee Schedule and Edit Quality Review, PERM), and Third-Party Liability Procurement projects. Dawn also provides support to other engagement projects, including:

- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (05/2019 – present)*
- *Data Improvement Project (09/2019 – present)*
- *Public Health Emergency (PHE) Support (12/2021 – present)*
- *Substance Use Disorder (SUD) Waiver Initiative Project (07/2017 – present)*
- *Provider Management Support (11/2019 – present)*
- *State Plan Review and Support (SPRS) (02/2020 – present)*
- *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (08/2020 – 02/2022)*
- *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (7/2021 – present)*
- *Partnership Management Support (December 2023 – present)*
Dawn serves as the program manager for the Partnership Management Support project, managing budgets and project deliverables and collaborating closely with the client to help ensure the team fully meets the project requirements and expectations.
- *APD Consulting Services (05/2023 – present)*
Dawn currently manages the BerryDunn team for the WV Engagement with facilitating the development and approval of APDs for the West Virginia Department of Human Services (DoHS) Medicaid enterprise. This involves coordinating the appropriate staff to gather necessary information for the development of APDs, to write APD narratives, and to establish budget tables for the funding request via the Medicaid Detail Budget Tables (MDBTs). This project also includes preparing complete APDs for review, approval, and submission by BMS for delivery to the Centers for Medicare & Medicaid Services (CMS). These activities occur with the development of new APDs, as well as with annual and as-needed updates to 10 established APDs.
- *PERM Project (05/2018 – present)*
Dawn serves as the program manager for the PERM project, managing budgets and project deliverables and collaborating closely with the client to help ensure the team fully meets the project requirements and expectations. This project includes validating claims payment or eligibility errors, researching error remedies, and providing oversight for resolution of PERM errors cited for WV. Under Dawn's leadership, the project team developed and submitted a recovery package for the PERM Review Year (RY) 2016 cycle. CMS agreed with the State's recovery package and overturned 71 errors, saving the State \$151,369. The project team reviewed 37 eligibility errors, three of which were overturned based on additional information provided to the reviewers. The project team reviewed 23 medical

record errors, 10 of which were overturned. The State saved \$81,022 due to overturned errors.

- *MMIS Fee Schedule and Edit Quality Review (09/2017 – present)*

Dawn served first as project subject matter expert (SME) before beginning her tenure as project manager. She collaborates closely with the client to evaluate the MMIS fee schedules and claim edits to help ensure MMIS setup follows Medicaid policy and to provide analysis of cost savings opportunities for BMS.

- *TPL Procurement (05/2019 – 03/2022)*

Dawn serves as a program manager, overseeing the TPL Procurement project which involves Request for Proposal (RFP) development and TPL vendor selection activities. Dawn collaborates with the client and BerryDunn team members to help ensure the project team meets the project objectives and the client expectations.

- **Colorado Office of State Auditor (OSA)**

- *Recovery Audit Contractor (RAC) (09/2023 – present)*

As the Medicaid Manager for the RAC project, Dawn provides oversight to the Medicaid teams research of State Medicaid Agencies (SMAs) RAC program to assist the Government Assurance Practice Group (GAPG) within BerryDunn in evaluating the Colorado Medicaid RAC program. Dawn collaborated directly with members of the OSA, the Colorado Department of Health Care Policy & Financing (HCPF) – the Colorado SMA, and the HCPF RAC vendor to gather information and address the findings of the evaluation.

- **United States Virgin Islands (USVI)**

- *Project Management and APD Support (10/2022 – present)*

Dawn supports the USVI with in the development and approval of APDs to support key program initiatives. Dawn provides project management support for key initiatives to support and enhance the USVI Medicaid program.

- **Hawai'i Department of Human Services Med-QUEST Division (MQD)**

- *Medicaid Organizational and Business Process Redesign (11/2021 – June 2022)*

Dawn supported the MDQ in PERM corrective action planning and response.

- **State of Alaska, Division of Legislative Audit (DLA)**

- *National Correct Coding Initiative (NCCI) Compliance Evaluation (07/2019 – 09/2019)*

Dawn supported the DLA in the development of an NCCI questionnaire to help assess Alaska Medicaid's compliance with the NCCI technical guidelines. The results of the assessment provided the DLA with confidence the Alaska MMIS complies with the NCCI technical guidelines.

Valley Health Systems, Inc. (12/2009 – 07/2017)

Dawn served as the Revenue Cycle Administrator for a group of over 30 Federally Qualified Health Centers (FQHCs). In this role, Dawn was responsible for the organization's accounts receivables. This included providing oversight of each health center's frontline staff, providing communications to medical, dental, and behavioral health providers on billing and

reimbursement issues. Her responsibilities included training over 400 doctors, dentists, and other health care providers and employees on the revenue cycle. Dawn worked with insurance payers such as Medicare, Medicaid—including WV, Ohio, and Kentucky—Public Employee's Insurance Agency (PEIA), and Children's Health Insurance Program (CHIP) to help secure payment for services rendered by the FQHC providers. Dawn managed the on-site implementation of a new electronic medical record and billing system, Intergy. Under Dawn's leadership and guidance, at the end of her first year of service to Valley Health Systems, Inc., the accounts receivable had increased 5% over the prior year.

Unisys (06/2004 – 11/2009)

As a domain services analyst, Dawn served as the configuration team leader and a medical coder for the WV Medicaid line of business. Dawn was a liaison for the MMIS configuration team and the WV BMS leadership.

Charleston Area Medical Center (08/2004 – 09/2004)

As a contracted medical coder, Dawn worked primarily with Charleston Area Medical Center's compliance department to perform billing audits of patient medical records.

West Virginia University (WVU) Physicians of Charleston (06/2001 – 06/2004)

While with WVU, Dawn worked as a senior billing specialist and a billing manager, serving the Department of Internal Medicine and the Department of Obstetrics and Gynecology.

Garnet Career Center (02/1999 – 01/2000)

Dawn worked as a medical coding instructor for the career center.

University Health Associates (09/1996 – 07/2001)

Dawn served in several roles with University Health, including a billing analyst, billing specialist, billing supervisor, and billing manager. She worked primarily with the Department of Obstetrics and Gynecology and the Family Medicine Center of Charleston.

Acordia National (12/1994 – 05/1996)

Dawn began her career as a medical claim examiner.

Ryan Wrisley, MHCDS, PMP®

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Manager
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	Master of Health Care Delivery Science, Dartmouth College Bachelor of Arts in Business Administration, University of Maine at Orono Certified Project Management Professional (PMP®)

Overview

Ryan is an experienced project manager with a unique blend of business and technical experience garnered through his IT strategic planning and requirements development work with state agencies and his previous work as implementation manager for a vendor of commercial financial accounting software. He is experienced in managing large-scale engagements/projects and leading initiatives that promote the open exchange of ideas and strengthen organizational performance.

Experience**BerryDunn (2011 – 2014; 09/2019 – present)**

Ryan is a manager providing Technical Program Management services to BerryDunn's Medicaid Practice Group (MPG) clients. Ryan currently provides oversight of West Virginia (WV) engagements, including WV's Department of Human Services (DoHS) and Bureau for Medical Services (BMS) projects, working closely with State and vendor leadership to help oversee technical projects and initiatives such as those related to data governance, Enterprise Data Warehouse (EDW) architecture and implementation and systems development lifecycle (SDLC) processes. Duties include but are not limited to coordinating communications across the BerryDunn portfolio management office, helping ensure resolution of project-related issues, helping to establish and maintain successful vendor and client relationships, and disseminating necessary information to the project team(s) and escalating appropriately to appropriate engagement managers. Additionally, Ryan helps provide oversight of Puerto Rico Medicaid Program (PRMP) projects and initiatives.

- **State of WV**

- **WV Bureau for Medical Services**

- *Program Manager*

- *Medicaid Enterprise Data Solution Implementation and CMS Certification Project (10/2019 – present)*
 - *Enterprise Data Governance/Technical Oversight (EDW, SDLC, Data Hub) (11/2023 – present)*

- **Puerto Rico Medicaid Program (PRMP)**

- *Program Manager*

- *Enterprise Data Warehouse Roadmap and DDI (06/2023 – present)*
- *Medicaid Enterprise Data Governance (11/2023 – present)*

- **State of Iowa**

- *Engagement Manager*
 - *ELIAS Phase I Assessment (01/2024 – present)*

- **Maryland Health Benefit Exchange (HBE)**

- *IV&V for Maryland's HBE Implementation (11/2012 – 04/2014)*
Ryan served as a quality assurance analyst for a project valued at approximately \$200 million dollars. He worked closely with the project manager and the project team that performed IV&V activities such as identifying risks and issues through a repeatable cycle process of performing interviews, evaluating documentation, and direct observation of activities being conducted to develop the Health Insurance Exchange. He also worked with the team to develop and present monthly findings and recommendations for mitigation that were communicated to the Executive Leadership of the project.

- **West Virginia Offices of the Insurance Commissioner (OIC)**

- *Health Insurance Exchange Planning (06/2011 – 03/2013)*
Ryan served as Project Manager for the development of a Strategic Technology Plan to guide West Virginia OIC's planning for its Health Insurance Exchange (HIX). In addition, he has provided program and portfolio management of the OIC's various planned initiatives that must take place for the HIX to become fully operational and comply with Federal healthcare reform requirements.

- **Maine Human Resources Division (HRD)**

- *System Analysis and Requirements Development for Procurement of Human Resources Management System (03/2012 – 08/2012)*
Ryan served as project manager for the development of requirements for an RFP to procure a Human Resources Management System (HRMS) for the State of Maine's HR Division. Ryan's responsibilities included, but were not limited to conducting a Current Environment Assessment, documenting process flows for each of the major business processes, identifying issues, challenges, and bottlenecks within each process flow, conducting research of peer state agencies, and developing technical and functional requirements for inclusion in an RFP to procure a new HRMS.

- **Massachusetts Office of the State Auditor (OSA)**

- *IT Roadmap (04/2012 to 06/2012).*
Ryan served as project manager for BerryDunn's engagement to develop a 48-month Technology Roadmap. His responsibilities included, but were not limited to conducting a Current Environment Assessment, identifying issues, challenges, and bottlenecks with current systems and processes, conducting research of peer state agencies, developing technology initiatives to address the issues, challenges, and bottlenecks, and providing a Technology Roadmap to guide the State Auditor's Office over a four-year horizon.

- **New Hampshire Liquor Commission (NHLC)**

- *Project Management for Next Generation Retail Business Systems (03/2011 – 01/2012)*

Ryan served as project manager for a systems planning and Request for Proposals (RFP) development project for the procurement of a new retail chain enterprise system for the NHSLC. The new system would replace the NHSLC's existing retail Point-of-Sale software, Warehouse Inventory Management System, Liquor Inventory and Distribution System, and support back-office systems.

MaineHealth Accountable Care Organization (MHACO) (2015 – 09/2019)

As the senior director of data operations and analysis, Ryan was responsible for data operations, analytics, and clinical applications teams for the MHACO. He procured an enterprise-wide multi-million-dollar Population Health Management Software Tool; was responsible for the aggregation of EMR/EHR data across different EMR/EHRs as well as claims data from commercial payors and CMS MSSP; developed analytic strategy and plan tied to operating plan to enable data-driven decisions; developed a data request triage process as well as data request help-desk process, and implemented help-desk software; and oversaw the legacy internally built clinical integration registry and the transition to the new Population Health Tool.

Dartmouth Medical School, Northern New England Accountable Care Collaborative, & High Value Health Care Collaborative (2014 – 2015)

Ryan served as an account manager and program director, hired by Dartmouth Medical School to work with NNEACC and HVHC to establish process and structure around programs and manage member accounts. He established internal project management processes and worked with core disease research teams at HVHC to determine and develop structure around each of the teams and assist in providing focus, tracking deliverables, developing reporting process, and defining value and goal attainment.

Tyler Technologies (formerly Advanced Data Systems) (2002 – 2011)

As implementation manager for Tyler Technologies, Ryan managed a team of consultants implementing financial software for the company's School Solutions Division. He managed software implementations in accordance with Project Management Institute (PMI®) standards for schools and health centers. Ryan successfully managed over 350 projects from point of sale to handoff to support. His work included meeting with clients to establish a project timeline, creating and reviewing documentation, facilitating client status meetings, obtaining client approval of key deliverables and milestones, providing quality assurance oversight of implementation activities, and managing staff resources. In addition, he provided client software support for MUNIS financial accounting software.

Bath Iron Works (1999 – 2000)

As a buyer for Bath Iron Works, Ryan managed a multi-million-dollar budget and was responsible for purchasing multiple commodities. He implemented an inventory system for warehousing at the shipyard, developed and maintained purchasing contracts with suppliers, and assisted with the shipyard's SAP procurement system implementation.

Dorothy (Dot) Ball, MA

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	30+
Certifications and Education:	<p>Master of Arts in Government, International Relations – Latin American Development, Public Policy Studies, and International Terrorism, New Mexico State University</p> <p>Bachelor of Arts in Government – Public Policy, Political Psychology, and International Relations, New Mexico State University</p> <p>Six Sigma Green Belt</p> <p>ESRI Geographic Information System (GIS) Technology Certification</p> <p>Agency for Healthcare Research and Quality's (AHRQ) Knowledge Transfer (KT)/Implementation program - State Healthcare Policy Program Certification.</p> <p>State of Texas, Secondary Education Certification</p> <p>AIDS Education and Training Centers Train the Trainer Educator Certification</p> <p>Centers for Disease Control (CDC) Public Health Advisor Certification</p>

Overview

Dot is a senior consultant with over 30 years of professional experience working in state and federal government, nonprofit and for-profit health services, healthcare policy, health information technology, clinical and direct service health care business, medical business management, professional education, and online education technologies. She is an experienced public policy and business operations expert and regulatory analyst with subject matter expertise across a multitude of Healthcare Reform areas, including the Affordable care Act (ACA), Health Information Technology (HIT), and Health Information Exchange (HIE) technology and governance structures, Medicaid business process modeling, Medicaid Information Technology Architecture (MITA), regulatory compliance and quality, HIPAA, health professional workforce training and eLearning technologies. She participates in state and national healthcare transformation initiatives including health reform, Health Level 7 (HL7), MITA, National Health Information Network (NHIN), Electronic Health Record (her) Adoption, and Health Information Exchange (HIE) projects and workgroups.

Experience
BerryDunn (06/2009 – present)

- **State of West Virginia (WV)**

- **West Virginia Bureau for Medical Services (BMS)**

- *Medicaid Enterprise Data Solution (EDS) Procurement Assistance, Implementation, and the Centers for Medicare and Medicaid Services (CMS) Certification Project*

Dot currently serves as the Project Training Lead and supports the Testing and Certification teams. She previously supported the Data Visioning & Warehouse Request for Proposal (RFP) and Concept of Operations (ConOps) Development, as well as the Certification team for the Procurement Assistance Project.

- *Medicaid Enterprise Gap Analysis and Project Management Services (GAPMS) Project (11/2016 – 03/2018)*

Dot served as Policy Analyst and ACA SME.

- **WV Department of Human Services (DoHS)**

- *West Virginia Medicaid Enterprise Integrated Eligibility Solution (IES) Project (09/2018 – present)*

Dot serves as Business Analyst / Subject Matter Expert (SME) supporting the Deliverables Review team for the West Virginia Project Management Services.

- *MITA 3.0 SS-A and MITA Lifecycle and Maintenance Projects (08/2012 – present)*

Dot serves as a MITA SME/Analyst.

- *ACA Compliance and Implementation Project (05/2010 to 12/2013)*

Dot served as a Lead Policy Analyst.

- *State Medicaid Health IT Plan and EHR Incentive Payment Program (02/2010 – 10/2010)*

Dot served as Business Analyst.

- **Puerto Rico**

- **Puerto Rico Medicaid Program**

- Puerto Rico Medicaid Management Information Systems (MMIS) Enterprise Objective Monitoring and Control Services (08/2020 – 09/2021)

Dot served as MITA SME/Analyst to support the MITA 3.0 SS-A teams and development of the Medicaid Enterprise Key Performance Indicators (KPI) Set/Guide.

- **Arizona Health Care Cost Containment System (AHCCCS)**

- *Testing Experience and Functional Tools in Community-Based Long-Term Services and Supports (TEFT) Grant PHR Assessment project (07/2014 – 09/2014)*

Dot served as Business Analyst/SME.

- **Massachusetts State Medicaid**

- *Health IT Plan and EHR Incentive Payment Program (10/2010 – 01/2011)*

Dot served as Business Analyst.

POGIS Consulting LLC/Dorothy A Ball Consulting (06/2009 – present)

As principal consultant for this small veteran-owned analytics and subject matter consultancy, Dot focuses on providing services in the areas of health IT, healthcare delivery systems, and government-funded health and human services.

In addition, Dot has served as Lead Policy Analyst for Alabama's Medicaid Managed Care External Quality Review project; MITA SME for AHCCCS and State of New Mexico Human Services Department MITA 3.0 SS-A; State of New Mexico Human Services Department National Human Services Interoperability Architecture (NHSIA) assessment; Policy Manager as part of an IV&V team for Arizona's Health Insurance Exchange implementation (dates); and Policy Analyst for business intelligence projects in various states, including Arizona, Utah, New Mexico, Illinois, New Hampshire, Florida, Arkansas, and Texas.

Consulting roles and projects include:

- Lead Analyst: New Mexico MMIS Replacement Project – Medical Assistance Division (MAD) MITA State Self-Assessment (SS-A) and Child Support Enforcement NHSIA assessment prepared for the State of New Mexico Human Services Department (HSD)
- Policy Manager: Arizona Health Insurance Exchange (HIX) IV&V
- MITA SME/Business Analyst: AHCCCS MITA 2.0 and 3.0 SS-A
- Policy Analyst: Michigan Department of Community Health (MDCH) ACA Implementation and Policy Application
- Lead Policy Analyst: WV BMS ACA Compliance and Implementation Project
- Lead Policy Analyst: Alabama Medicaid Managed Care External Quality Review (EQR) project

FourThought Group, Inc. (08/2002 – 05/2009)

As senior business analyst, Dot provided policy analysis, regulatory analysis, business process analysis, and change management for state health and human services agencies, including work on the following projects:

- Business Analyst for the AHCCCS MITA Analysis Project
Dot performed business process mapping, and affinity analysis, business process analysis within the MITA 2.0 Framework, develops As-Is and To-Be Assessments, data collection surveys, documentation review, plans and facilitates validation sessions, performs quantitative and qualitative gap analysis and documentation, develops solutions transition and sequencing plan MITA strategic Roadmap.
- Lead Business Analyst for AHCCCS Fee for Service Management Division (FSM) MITA Assessment
Dot managed the MITA business analysis team.
- Lead Business Analyst for AHCCCS and Department of Economic Security (DES)
Dot worked to initiate Phase I of the State of Arizona Technology Interface Project System (TIPS).

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- Lead Business Analyst managing functional requirements engineering for Maricopa County Integrated Health Systems (MIHS), Third-Party Administrator Transition and System Implementation project
Dot managed requirements development team.
 - Policy consultant/Business AHCCCS and Hawaii Department of Human Services (DHS)
Dot was a member of the HIPAA privacy policy compliance team completing assessments.
 - Lead Business Analyst Indiana MITA Analysis project.
Dot performed business process modeling within the MITA 2.0 Framework, business process mapping, and affinity analysis, developed As-Is and To-Be Assessments and web enabled documentation request surveys using Survey Monkey, planned and facilitated validation sessions, and documentation review, and developed solutions transition and a sequencing plan for the MITA strategic Roadmap.
 - Pharmacy /Provider Relations SME for Mississippi Data Warehouse/Decision Support System Design, Development and Implementation project.
 - Senior Policy Analyst for South Dakota HIPAA Security Policy and Procedures compliance project.
Dot performed policy and procedures gap analysis of existing Department and State Information Technology authority documentation.
 - Business Analyst responsible for performing an organizational assessment of the Mississippi Medicaid program within the CMS MITA framework. (This was among the first MITA assessments performed.)
 - Policy Analyst providing support to the CMS Medicaid Information Technology Architecture (MITA) Initiative Team.
Dot provided policy guidance for the development of MITA Business Model and MITA Assessment tools. She participated in MITA framework development workgroups and MITA MMIS reshaping efforts including HL7 Financial Management workgroup and was familiar with most aspects of the framework and technical specifications.
 - Business Analyst/SME for Washington State Medicaid MMIS procurement project.

New Mexico Health Policy Commission (03/2000 – 08/2002)

As senior policy analyst, Dot was responsible for the management of state policy and planning projects addressing access to healthcare, including:

- Managing task force activities and studies, including Medicaid cost containment, prescription drug access, provider retention issues, workforce shortages, health professional regulation, and rural and immigrant access to healthcare
- Managing population survey and data analysis projects that resulted in significant legislative changes
- Conducting research and monitoring key federal and state health policy issues, including access to care, health professional workforce, Medicare and Medicaid reform issues,

managed care, disease management, prescription drug policy, immigrant health, border health, and various public health policy issues

- Analyzing and interpreting state and federal laws and regulations
- Analyzing health care legislation and providing technical support to the state legislature, governor, and the New Mexico delegation to the U.S. Congress
- Developing data collection tools and survey instruments
- Conducting comparative health data analysis
- Responding to legislative requests and mandates

Rio Bravo Therapy Services (08/1996 – 11/1999)

As development director, Dot managed agency development activities, including financial and program development, service delivery, business management budget, and board development activities for a full-service physical/occupational rehabilitation center.

Southwest AIDS Services (01/1992 – 04/1994)

Dot was responsible for overall agency management activities, including programs, boards, staff, and general operations for a full-service, multi-county nationally recognized AIDS support services organization.

New Mexico Department of Health (09/1989 – 01/1992)

As disease prevention specialist, Dot conducted state public health infectious disease surveillance activities, including epidemiological investigations, case management, and data analysis; clinical and disease management quality assurance policies and protocols; and border health policy studies for the New Mexico Legislature.

Alexandra (Alex) Glowacky, CAPM

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	5 years
Certifications and Education:	Bachelor of Arts in Sociology, Colby College (summa cum laude) Project Management Institute (PMI) Certified Associate in Project Management (CAPM®)

Overview

Alex is a highly motivated senior consultant with the Medicaid Practice Group, with interests and experience in policy analysis, program development, and stakeholder engagement processes. She has worked on a range of Medicaid policy projects, bringing experience with 1115 Demonstration waivers, the State Plan and associated State Plan Amendment (SPA) work, 1915c waivers, planning grants, and regulatory analysis and compliance. She has extensive knowledge in social systems and offers an adaptive project management skillset. Her strong communication skills paired with organizational strategies developed through work at community organizations, enhance her leadership and project management knowledge base. She is an experienced moderator and facilitator and has worked with varied groups of stakeholders throughout her career, including State Medicaid agencies, State partner agencies, and federal partners.

Experience**BerryDunn (07/2021 – present)**

- **State of West Virginia (WV)**

- **WV Bureau for Medical Services (BMS)**

- *Technical Assistance and Project Support (TAPS) Phases IV and V (05/2022 – present)*

As project manager, Alex has provided oversight of subprojects and task requests approved and executed under the TAPS project umbrella. This includes coordinating and tracking task requests and subproject submission and approval processes, coordination with project leads on project status as a TAPS subproject and creating and delivering all TAPS project reporting documentation. Alex also coordinates and leads research and tasks that fall under the scope of TAPS, such as the review and impact analyses of Centers for Medicare & Medicaid Services (CMS) rules and other federal guidance relevant to Medicaid.

- *State Plan Review and Support (SPRS) Project Phases II and III (01/2022 – present)*

As the project manager for the SPRS project, Alex assists with the management of activities related to the State Plan, including but not limited to drafting and

development of SPAs and associated packages, regulatory compliance, and advisory council engagement. She additionally supports the State team working on State Plan submissions, tracking active SPAs and working closely with BMS to help ensure SPAs move forward in public notice, submission, negotiation, and approval processes.

- *Substance Use Disorder (SUD) Waiver Initiative Project (07/2021 – present)*

As project manager, Alex assists the State with activities specific to the development, implementation, and oversight of SUD waiver services in WV. Her focus at present is supporting the State as BMS prepares to negotiate the SUD 1115 waiver renewal and expansion application, working on federal negotiation and stakeholder engagement efforts in preparation for the implementation of the renewal. She additionally supports the State's tracking of waiver monitoring and evaluation activities for the demonstration. Prior to leading the project, Alex served as deputy project manager and a research analyst.

- *Advanced Planning Document (APD) Support Project (10/2022 – 12/2023)*

Working on the APD Support Project, Alex supported the project management of APD development to help ensure the State gets necessary funding for MITA aligned initiatives. Alex has contributed to the creation of several APDs, most recently having worked on the Medicaid Management Information Systems (MMIS) APD update.

- *American Rescue Plan (ARP) Section 9813: Mobile Crisis Grant Project (08/2021 – 08/2022)*

As project coordinator and a policy analyst for the ARP Mobile Crisis project, Alex assisted the State in planning for the implementation of the Medicaid mobile crisis services program. She conducted program coordination among involved stakeholders, captured meeting notes, tracked action items, and supported the development of project deliverables, such as the creation of the SPA draft for submission to CMS.

- *Children with Serious Emotional Disorder (CSED) Waiver Phase III Project (07/2021 – 06/2022)*

As a policy analyst for the CSED Waiver Project, Alex provided policy research and synthesis support for the State's initiative and contributed to the creation and revision of deliverables such as Waiver amendments, CMS Evidence Requests, and stakeholder engagement documentation.

Civic Engagement and Community Partnerships Committee (01/2021 – 07/2021)

Alex worked as a student advisor to collaborate in assessing and strengthening working relationships between Colby and local community organizations, developing and implementing engagement-building initiatives. She served as an ambassador for experiences focused on civic learning and democratic engagement.

Farnham Writers' Center (09/2018 – 07/2021)

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

Cambridge Women's Center (Winter 2019)

Alex worked as a resource and research intern to investigate and network with other local social service organizations to update and revitalize the organization's resource guides. She trained in providing emotional support and relational assistance to trauma survivors.

Shandia Benke

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Project Coordinator
Years of Experience Relevant to Proposed Role:	5 years
Certifications and Education:	Bachelor of Arts in History, Columbia College Entry Certificate in Business Analysis (ECBA™) Certified

Overview

Shandia is an ECBA™ certified project coordinator with over 10 years of experience in successfully supporting projects across a multitude of industries, including financial services, education, and landscaping, as well as within the federal and state health insurance and social programs sphere. Shandia excels as a senior paraprofessional, providing valuable administrative and coordination support to help enhance productivity to all projects she is involved with. Shandia's deep expertise provides her with a strong foundation and keen insight in a variety of project aspects, including editing and reviewing, analysis, metrics gathering, writing, managing project documentation, SharePoint site construction, leading Joint Application Design (JAD) sessions, conducting user acceptance testing (UAT), meeting facilitation, internal training and onboarding, vendor training and onboarding, and systems and processes set up and improvement. Shandia is a proven resource for creative problem-solving and is especially adept at identifying gaps and helping to communicate and facilitate improved business processes.

Experience

BerryDunn (04/2018 – present)

- **State of West Virginia (WV)**

- **WV Department of Human Services (DoHS)**

- *People's Access to Help (PATH) Project (05/2023 – present)*

Shandia provides coordination and analytical support to the PATH project through capturing detailed notes, editing and reviewing project documentation, and contributing insightful process and business analysis. Additionally, Shandia focuses on promoting efficiency through identifying gaps in internal processes and opportunities to provide process improvements.

- **Missouri Department of Social Services (DSS)**

- *Missouri Medicaid Enterprise (MME) Project Management Office (PMO) Engagement Electronic Visit Verification (01/2021 – present)*
 - *MME PMO Program Integrity (02/2019 – 01/2021)*
 - *MME PMO Business Intelligence Solution – Data Warehouse Enterprise (04/2018 – 02/2019)*

Shandia has supported the MME PMO through three implementation projects – two from start-up to certification and project closure. She provides support by creating, editing, reviewing, tracking, analyzing, assessing, and storing project documents in the client's SharePoint site; scheduling and providing meeting minutes for all project meetings; facilitating meetings; tracking and assessing project defects, questions, decisions, action items, and internal client/vendor/provider questions; providing analysis, quality metrics, and validation for project work; and identifying opportunities to implement structure and process improvements. BerryDunn's team helps the State address topics from strategies for modular certification and requirements traceability to program management best practices to leverage for a multi-vendor enterprise.

Jefferson City, MO Chamber of Commerce (2017 – 04/2018)

As the membership and special events coordinator, Shandia fulfilled a range of administrative support duties, including creating reports to help facilitate decision-making internally and among committees; scheduling internal and external events and meetings; creating and maintaining detailed records of events, event participation, and financial transactions; and providing administrative support for the Jefferson City (JC) Chamber's ambassadors and their activities, such as ribbon-cutting and membership appreciation events. In addition, Shandia maintains committee records, event registrations, and member prospects in the JC Chamber membership database. Shandia also supports key office clerical activities as needed.

United Landscape Design (2017)

As an office administrator, Shandia created and provided an organizational and systematic structure within the company to increase efficiency, promote efficacy, and support the goals and visions of the business.

Lighthouse Preparatory Academy (2015 – 2017)

As an office manager, Shandia assisted in establishing systems and structures to help the office and organization run more effectively. In addition, Shandia oversaw daily accounting activities for the general ledger; assisted in the preparation of the annual budget; helped resolve accounting, payroll, and financial issues; maintained office records; and conducted meetings with Academy staff.

Lighthouse Preparatory Academy (2012 – 2016)

- *Teacher (2012 to 2016)*
As a teacher, Shandia taught a range of subjects, including 6th Grade Grammar and Composition; 7th Grade Literature; Life Fitness; High School Psychology; Keyboarding; and Introduction to Computers.
- *Dean (2012 to 2015)*
As a dean, Shandia managed the character education program and provided support to students, families, and faculty.

Hentges Tree Service (2013 – 2015)

As an office administrator, Shandia supported the mechanical fleet at Hentges by utilizing Dossier interface software. In this position, Shandia also created new internal processes and procedures to increase office efficiency.

Wells Fargo Home Mortgage (2012)

As an administrative assistant, Shandia provided office support for the home mortgage business. As part of this role, she helped to coordinate training, plan events, schedule meetings, and order and distribute office supplies.

Krista Clay

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Staff Consultant
Years of Experience Relevant to Proposed Role:	4 years
Certifications and Education:	Bachelor of Arts in Psychology, Marshall University Collaborative Institutional Training Initiative (CITI) Program: Social and Behavioral Responsible Conduct of Research, Credential ID 45589043 CITI Program: Social / Behavioral / Epidemiological Research Investigators, Credential ID 45589023

Overview

Krista is an experienced staff consultant with a broad scope of administrative, software, and management skills. She has demonstrated success in prioritizing client needs and deliverables, effectively balancing numerous projects at once with strong organizational and time management skills to maintain productivity and communicating clearly with others to break down complex ideas and resolve problems. Krista currently serves as a consultant working with West Virginia's (WV) Department of Human Services (DoHS) and Bureau for Medical Services (BMS), supporting State clientele with the project coordination/consulting of various Medicaid projects by maintaining work schedules, organizing shareholder meetings, conducting relevant project research and analysis, and helping to ensure deliverables and Service Level Agreements (SLAs) are met.

Experience

BerryDunn (11/2023 – present)

Krista is a consultant with BerryDunn's Medicaid Practice Group (MPG), supporting the following projects:

- **State of West Virginia (WV)**
 - WV Department of Human Services (DoHS)**
 - WV Bureau for Medical Services (BMS)**
 - *Payment Error Rate Measurement (PERM) Reporting Year 2023 (RY2023) Phase II*
 - *Substance Use Disorder (SUD) 1115 Waiver Project Phase V*
 - *Data Improvement Project (DIP) Phase 3*
 - *DIP Phase 4*
 - *Public Health Emergency (PHE) Support Phase II*
 - *Medicaid Information Technology Architecture (MITA) AA-A Annual Update 2021*
 - *WV Technical Assistance and Project Support (TAPS) Subprojects*
 - *Mental Health Parity and Behavioral Health Support Project*

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- *American Rescue Plan (ARP) Community-Based Mobile Crisis Services Phases I & II*
 - *ARP Home Community-Based Services (HCBS) Implementation*
 - *People's Access to Help (PATH) Project*

Krista's role as a consultant for these projects includes maintaining continuous coordination and communication with project managers for scheduling meetings, managing agendas, action items, meeting notes, and correspondence, as well as researching the latest data and resources for updated information within each project. She assists with other items such as monthly status reports, news roundups, Centers for Medicare & Medicaid Service (CMS) reporting, Commissioner Briefing (CB) reporting, and project trackers.

TEKsystems (11/2022 – 11/2023)

Krista worked as a project coordinator, supporting State Medicaid and Human Resources Program clientele with the coordination of various projects by maintaining work schedules, organizing shareholder meetings, conducting relevant project research and analysis, and helping to ensure deliverables and SLAs were met.

Altis Movement Technologies (05/2022 – 07/2022)

Krista served as Personal Assistant to the Chief Executive Officer (CEO) and Special Projects Coordinator to maintain strong relationships with exceptional communication and interpersonal skills between various departments. She managed project budgets, organized tasks, and responsibilities into execution, and used situational awareness and critical thinking skills to solve problems. Krista was responsible for taking meeting notes, planning meetings, organizing schedules and calendars, and providing updates on current projects to stakeholders.

American Campus Communities (01/2019 – 08/2020)

- Senior Leasing Agent/Community Coordinator (01/2019 – 08/2020)

Krista was responsible for over \$700,000 in the company's leasing sales. She planned meetings, organized schedules, and calendars, and provided updates on current resident/prospects. Krista was responsible for completing large volumes of leasing paperwork and oversaw the signing of leasing documentation. She managed administrative work to smooth new resident move-in processes, planned marketing and outreach strategies to consistently bring in new leasing prospects, and quickly addressed student and residential problems to avoid escalation and keep the residential environment peaceful and welcoming. She adhered to fair housing standards to help avoid any legal issues and help prevent discriminatory practices and tracked leasing inquiries and vetted prospects with leasing systems to stay organized and efficient against leasing targets. Additionally, Krista organized events to engage residents and build a keen sense of community, met with board of directors to discuss community needs and resolve issues or disputes, and conducted 50+ showings per week to convert prospects into qualified residents.

- **Social Media Ambassador (08/2019 – 08/2020)**

Krista participated in and created social media content for the leasing office's Instagram, Facebook, and TikTok. She engaged in the ideation and creation of different giveaways and other marketing strategies and completed contract work with the company as an ambassador.

YUM! Brands (09/2016 – 01/2018)

Krista served as Shift Manager in charge of cash drawer drops and preparing daily bank deposits. She trained new team members to adhere to company policies and service standards in addition to mentoring on job-specific skills. Krista was instrumental in the opening of a new franchise in WV.

Hailey Holden

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Staff Consultant
Years of Experience Relevant to Proposed Role:	8 years
Certifications and Education:	Bachelor of Arts in Psychology, Purdue University

Overview

Hailey is a leadership driven professional with more than 10 years' experience creating solution-focused, and collaborative partnerships in large volume and high stress situations. She is an excellent communicator with a passion for positive change who specializes in client-contractor coordination, personnel management, project management, event planning/marketing, recruitment, resource management, and process improvement.

Experience

BerryDunn (07/2022 to present)

- **State of West Virginia (WV)**

- **West Virginia Bureau for Medical Services (BMS)**

- *West Virginia Engagement Coordinator (07/2022 – present)*

As the Engagement Coordinator, Hailey is responsible for updating and maintaining a variety of documents including master project trackers, funding trackers, and project timelines. She collaborates with team members to develop, update, and/or maintain policies and procedures, firm and engagement templates, and documentation related to process improvements. She also collaborates with the consultants and project managers to create and process staffing requests to the WV client, as well as tracking the requests and approvals. Hailey also works alongside team members and the New Business Development team to create, update, and maintain resumes as it relates to staffing requests. She performs a variety of overflow project coordination duties, such as creating meeting agendas, taking meeting notes and making updates as-needed, and documenting service level agreements.

- *Partnership Management Support Project (12/2023 – present)*

Hailey currently assists with leverage and reuse initiatives and provides project management support.

- *Advanced Planning Document (APD) Support Project (05/01/2023 – present)*

Hailey assists in compiling, tracking, and reviewing a variety of APDs.

- *Provider Management Support Project (01/2023 – 10/2023)*

Hailey worked on leverage and reuse initiatives for WV and the United States Virgin Islands including support with compiling and reviewing APDs.

El Paso County Department of Human Services (04/2021 – 07/2022)

Hailey served as an Adolescent Lead Social Caseworker IV to provide over 2500 hours of intensive casework services to families and children yearly. She developed productive working relationships with clients, creating a collaborative partnership between team members and stakeholders; successfully identified the needs of clients to create and implement solution-focused plans of action; and helped to ensure the successful completion of short- and long-term goals by monitoring and documenting progress. Hailey conducted research and investigation to help ensure proper reporting, prosecution, and documentation of child abuse and neglect reports. She also performed assessments of new cases, referred clients to appropriate resources creating a substantial decrease in repeat infractions, and provided accurate updates and testimony in court hearings and mediations. She trained and supervised new caseworkers and acted in a supervisory role to members of the casework team.

Lake County CASA Program (04/2016 – 04/2021)

Hailey served as a Lake County Court Appointed Special Advocate who advocated for the best interests of abused and neglected children involved in child welfare proceedings. She provided representation and testimony in open court on behalf of the client's best interest, collaborated with the local Department of Child Services and service providers, and led and trained volunteers to properly conduct case management supporting the best interests of clients. She hosted and pioneered the recruitment, training, and management for over 100 community volunteers. Hailey also initialized and maintained the secure database to store documentation, and client demographic information. She compiled statistical data to best represent the organization allowing for a marked increase of both state and national grant funding. Additionally, she planned community outreach events, developed and implemented marketing plans for recruitment, and designed, created, and distributed marketing materials for the program including flyers, brochures, postcards, and other outreach items.

Second Chance for Pets Network (01/2015 – 01/2017)

Hailey served as a Board Member to monitor animals in their respective foster homes, helping to ensure all needs were met. She evaluated business and fiscal plans to help ensure the proper running of the organization, organized social media campaigns, and hosted fundraisers for over 400 people. She also assisted in recruiting and training volunteers and conducted outreach to collaborate with local businesses to develop partnerships for raising funds.

Azba Hotelwala

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	5 years
Certifications and Education:	Master of Public Affairs with a concentration in Public Management (in progress) Bachelor of Science in Kinesiology, Indiana University Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT + MCMP-II)

Overview

Azba is a skilled healthcare professional with a diverse background in communications, community engagement, patient care and management, lab techniques, CRM software, and Atlassian Suite tools. With experience in both public and private organizations, Azba has successfully used data and research to support and care for patients and clients. Her contributions to project management and successful project implementation demonstrate her attention to detail and ability to simplify complex information. She has played a significant role in developing project deliverables such as monthly status reports, presentations, statements of work (SOWs), project closeout summaries, advanced planning documents (APDs), and vendor performance scorecards. Azba demonstrates her analytical skills through analyzing West Virginia (WV) requirements alignment with federal requirements and conducting gap analyses to develop business process forms for state self-assessments (SS-As). Azba's strong time management and ability to handle multiple projects simultaneously make her a valuable asset. Her diverse skill set, commitment to growth, and adaptability in different environments further enhance her value to any team.

In addition to her technical skills, Azba is pursuing graduate-level coursework in public policy, public finance and budgeting, public management economics, statistical analysis for effective decision-making, and design and management of complex projects. With this knowledge, she can navigate the complexities of healthcare policy and help make well-informed decisions.

Experience

BerryDunn (05/2022 – present)

- **State of West Virginia (WV)**

WV Bureau for Medical Services (BMS)

- *Certified Community Behavioral Health Centers State Plan Amendment (09/2022 – present)*

As a consultant, Azba has made significant contributions to the CCBHC team. Her support includes taking meeting notes, conducting thorough artifact research, diligently tracking project milestones, and preparing comprehensive monthly

status reports. She has also demonstrated her expertise in developing presentations and effectively documenting action items, risks, issues, and decisions. Furthermore, Azba has played a crucial role in drafting and conducting peer reviews of multiple deliverables, helping to ensure their high quality and accuracy.

- *Medicaid Information Technology Architecture (MITA) 3.0 SS-A Maintenance and Annual Update Assistance Project (09/2022 – present)*

As a project coordinator, Azba provides support in MITA lifecycle maintenance activities. She simultaneously develops presentations for client meetings, takes meeting notes, conducts artifact research, tracks project milestones, prepares monthly status reports, manages action items, identifies risks/issues, and makes informed decisions. Azba has also assisted in the development of deliverables such as the Data Management Strategy (DMS) report and the Health Information Technology (HIT) report. Azba has conducted a detailed gap analysis to inform updates for the 2021 SS-A report and road map in the business relationship management area. Additionally, she has contributed to the planning efforts for the utilization of Jira software in the upcoming SS-A period.

- *ARPA Section 9817: HCBS Implementation Project (05/2022 - 09/2022)*

As a project coordinator for the project, Azba actively engaged in research and analysis, providing valuable insights and supporting the development of essential project deliverables.

WV Department of Health and Human Services (DoHS)

- *Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project (05/2022 – present)*

As a project coordinator, Azba has provided support to the EDS team in various areas including taking meeting notes, conducting artifact research, and tracking project milestones, action items, risks/issues, and decisions. She has also assisted in the development of deliverables for contractual obligations such as APDs, SOWs, vendor performance scorecards, and project closeout summaries. Additionally, she is proficient in using Atlassian Suite tools like Confluence, Jira, and Jama.

LaSalle Network (01/2022 – 05/2022)

Azba served as a Recruiting Intern for the Healthcare Revenue Cycle Team to screen and evaluate 30-50 applications a day using CRM software to create a pool of qualified candidates for phone interviews. She conducted phone interviews to assess whether a candidate should be considered for advancement in healthcare roles. Additionally, Azba communicated with job seekers daily to evaluate their communication and technical skills, explain LaSalle's services, and pitch job opportunities.

Mother Hubbard's Cupboard (08/2018 – 05/2022)

Azba served as an Advocate for Community Engagement where her main role was to recruit service-learning courses at Indiana University that would meet the needs of Mother Hubbard's Cupboard, a local food pantry. She successfully implemented and facilitated reflection sessions with students to encourage a meaningful volunteering experience. In addition, Azba carried out

annual surveys and Community Development Block Grant (CDBG) forms to aid Mother Hubbard's Cupboard in receiving proper funding.

IU Health Bloomington Hospital (06/2021 – 02/2022)

Azba worked as a patient care technician in the Adult Medical Unit, where she was responsible for monitoring patients' vital signs and remaining alert to any changes. Azba also performed lab specimen collection procedures and provided assistance to patients with activities of daily living. Collaboration with other healthcare staff was a key aspect of her role to help ensure patient comfort and promote overall well-being.

University Elementary School (01/2021 – 06/2021)

Azba served as an Assistant Health Aide at University Elementary School for the MCCSC school district. Her primary tasks included COVID-19 data entry and utilizing her first aid skills to assess and address students' needs. Azba played a crucial role in maintaining accurate health records and creating a safe learning environment for students.

Hoosier Home Health (03/2020 – 05/2021)

Azba worked as a home health aide, where her main responsibilities involved assisting disabled and geriatric patients with activities of daily living to facilitate their independence and well-being. Azba remained vigilant in monitoring patients' health and promptly responded to any health concerns to help ensure their optimal well-being.

Kourtney Kirk

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	7 years
Certifications and Education:	Bachelor of Science in Business Administration, Glenville State University Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT + MCMP-II)

Overview

Kourtney is an experienced project coordinator and consultant with an extensive knowledge of documentation, communications, and scheduling needs related to Medicaid Enterprise Systems development. Her attention to detail and complex organization skill sets have allowed her to be a valuable team member across multiple projects, with the ability to assist in drafting contract deliverables, tracking action items, risk, and issues, developing and distributing project agendas and meeting materials, as well as aiding in the creation of Scopes of Work (SOW) and project budgets. She has a proficiency in customer resource management systems, such as the Microsoft and Atlassian Suites. Kourtney has a history of working in data analysis, graphic design and advertising, event planning, and communication and sales. She has strong leadership skills, the ability to work under pressure and deadlines, and confidence in speaking, working on a team, and understanding new concepts.

Experience

BerryDunn (10/2022 – present)

- **State of West Virginia (WV)**

- **WV Department of Health and Human Services (DoHS)**

- *People's Access to Help (PATH) Eligibility and Enrollment Implementation Assistance (10/2022 – present)*

- **WV Bureau for Medical Services (BMS) (08/2020 – 01/2022; 10/2022 – present)**

- *Medicaid Enterprise Data Solution Implementation and CMS Certification Project (08/2020 – 01/2022; 10/2022 – present)*
 - *Medicaid & Children's Health Insurance Program Enterprise System (MCES) Procurement Assistance Project (08/2020 – 01/2022)*

As a project coordinator for People's Access to Help (PATH), the Enterprise Data Solution (EDS), and MCES projects, Kourtney has a wide range of project duties. She creates agendas, maintains meeting schedules, and provides quality control for meeting materials to satisfy contract Service Level Agreements (SLAs). She maintains project information and tracks action items, risks, issues, and decisions, in addition to developing and distributing meeting minutes. As the lead

coordinator for the EDS Project, she assists in the creation and maintenance of Advance Planning Documents (APDs), project deliverables, and budgets, creates monthly status reports, and maintains project rosters for the Project Management Office (PMO), client, and vendors. As a project consultant, she assists with research communication needs across various project workstreams.

- *Business Intelligence (BI) and EDS Independent Security Assessment Project (05/2023 – 10/2023)*

As the lead coordinating consultant, Kourtney assisted with facilitating meetings between PMO, State, and vendors, and developed and distributed meeting materials. Additionally, she was responsible for creating monthly status reports and project deliverables, tracking action items and decisions, and helped ensure adherence to the project timeline and sensitive documentation and communication needs.

TEKSystems (08/2020 – 01/2022)

Kourtney served as a project coordinator, supporting WV engagement projects.

N3 (03/2018 – 11/2018; 08/2019 – 08/2020)

- *Business Development Representative and Scheduling Coordinator (08/2019 – 08/2020)*
Kourtney worked on the Microsoft Software Asset Management + Compliance Campaign to support Microsoft Account Executives and clients, scheduled meetings between clients and Microsoft AE's to upgrade their software products, and contact potential clients through phone calls and emails. She sent meeting invites, action items, and follow-ups to the Account Executive and clients, utilized Teams for virtual meetings and conference bridges for phone meetings, and completed each meeting with follow-up summary.
- *Business Development Representative (03/2018 – 11/2018)*
Kourtney worked directly with Microsoft as an Inside Sales Account Executive for Unified Support Gained on a full cycle sales experience with Microsoft's new support services. She displayed interpersonal skills and a positive attitude toward client and coworkers, successfully communicated with contacts via the phone dial, and identified the key aspects of a potential lead, including need, budget, and time frame. Kourtney obtained general knowledge of the IT industry, with the capacity to learn about individual systems and products quickly and accurately for marketing purposes. She met with regular quotas of calls and qualified leads, communicated information about calls accurately and effectively to management and clients, effectively managed time and worked well independently or under supervision, and managed client relationships.

Total Quality Logistics (11/2018 – 08/2019)

Kourtney served as a Logistics Account Manager who was the primary contact for clients and independent freight carriers. She presented sales presentations to prospective clients, created a list of ongoing business accounts via prospecting networking and referrals, and managed daily shipments and confirmed pick-up and delivery of shipments. She communicated proactively

customers and freight carriers daily, provided clients with the highest level of customer service and support to retain their business, and enacted responsive customer service to resolve client issues quickly and efficiently.

Glenville State University (08/2012 – 12/2017)

Kourtney served as the student intern, responsible for filing any donations made to the college. She used Razor's Edge and BlackBaud technology systems, communicated directly with GSC Alumni to request donations to the Glenville State College Foundation, and prepared presentations and marketing advertisements for the Foundation. She served as executive assistant to Call Stars program and assisted in the hiring process, entered contact information into contact management systems, and maintained tracking reports of public relations activity. Kourtney also performed analysis of donations made by Alumni and businesses and represented the goodwill of Glenville State College.

Katie McDonald, MBA

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Senior Paraprofessional
Years of Experience Relevant to Proposed Role:	6 years
Certifications and Education:	Master of Business Administration, focus on Healthcare Administration, Marshall University Bachelor of Arts in Communication Studies, focus on Organizational Communication, Marshall University Project Management Institute® (PMI®) Certified Associate in Project Management (CAPM®) (<i>in progress</i>)

Overview

Katie is a Senior Paraprofessional with extensive knowledge in communication skills including engaging, professional presentations, superior-subordinate communication, intercultural communication, leadership and group communication, research, theory, and rhetoric. She has developed foundational knowledge in marketing principles, public relations, economics, sales, and workplace language. Through her work she has refined superior organizational skills, detail-oriented problem-solving abilities, and has become a successful and confident communicator.

Experience
BerryDunn (05/2022 – present)

- **State of West Virginia (WV)**

- **WV Department of Human Services (DoHS)**

- *Partnership Management (12/2023 – present)*

- Katie provides project coordination assistance to DoHS, supporting planning, developing, and management of the Multi-state Collaborative Meeting and various tasks for the Leverage and Reuse process for the United States Virgin Islands (USVI). Katie helps with preparing presentations and developing and reviewing project deliverables for various project-related activities and tasks.

- *People's Access to Help (PATH) MARS-E Security Assessment (11/2023 – present)*

- Katie provides project coordination assistance to DoHS with planning and helping to manage the PATH MARS-E Security Assessment project. Katie helps with developing and reviewing project deliverables for various project-related activities and tasks.

- *Medicaid Information Technology Architecture (MITA) 3.0 State Self-Assessment (SS-A) Maintenance Annual Update Assistance Project (07/2023 – present)*

- Katie assists with MITA life cycle maintenance activities, including developing new

business process improvement flows and updating MITA related reports.

- *Provider Enrollment (PEA) Project and Provider Management Support (08/2023 – 10/2023)*

Katie provided project coordinator assistance with planning, developing, and helping to manage the Multi-state Collaborative Meeting and various tasks for the Leverage and Reuse process for the USVI. Katie helped with preparing presentations and developing and reviewing project deliverables for various project-related activities and tasks.

- *Advance Planning Document (APD) Consulting Project (05/2023 – present)*

Katie provides project coordinator assistance with planning, developing, and helping to manage the APD funding process. Katie helps with preparing presentations and developing and reviewing project deliverables for various project-related activities and tasks.

- *PATH DDI Project Management (03/2023 – present)*

Katie provides project coordinator assistance with implementing the PATH system. Katie helps with taking notes and developing and reviewing project deliverables for various project-related activities and tasks.

- *Department of Justice (DOJ) Agreement Implementation Plan (05/2022 – present)*

Katie provides project coordinator assistance with implementing its five-year plan to improve the continuum of care for children and families, pursuant to DHHR's agreement with the DOJ, now in its fourth year. Katie helps with preparing presentations, developing, and reviewing project deliverables, and conducting research and analysis for various project-related activities and tasks.

Sedgwick Claims Management Services (08/2017 – 05/2022)

Katie worked as a Claims Assistant in charge of managing the mailed claims, attending to medical and legal bill payments, and taking claimant and provider phone calls. Her responsibilities included meticulous claims data entry and verification and helping to ensure the accuracy and timeliness of information critical to the processing pipeline. Collaborating closely with teams, she identified process bottlenecks and areas for improvement, actively participating in discussions to optimize the claims administration workflow. Some tasks this affected were the workflow for processing subpoenas for claims records and the workflow for processing settlement agreements.

Megan Blount, MBA

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	9 years
Certifications and Education:	MBA, University of Charleston BS, Communications, West Virginia State University

Overview

Megan is a highly efficient project coordinator, experienced in scheduling, time management, written and verbal communication, and collaboration with all levels of administrators, stakeholders, and community leaders. She is comfortable performing detailed and intricate tasks with a high degree of accuracy and confidentiality within a complex environment with tight, constantly shifting deadlines.

Experience
BerryDunn (04/2021 – present)

Currently, Megan serves as part of BerryDunn's Medicaid Practice Group, working with the West Virginia (WV) Bureau for Medical Services (BMS) on project management initiatives.

- **State of WV**

- **WV BMS**

- *Advanced Planning Document (APD) Consulting Services (05/2023 – present)*
Megan serves as a project coordinator for the APD Consulting Services project where she supports the strategic planning of APDs. In this role, Megan assists the State team with processes for renewal and tracking progress in the development and submission of APD documents to Centers for Medicare & Medicaid Services (CMS), by assisting with the development, updates, and management of multiple APD's in support of funding for new Department of Human Services (DoHS) systems projects.
 - *Public Health Emergency Support Project (12/2021 – present)*
Megan provides project coordination, deliverable development and review, and tracks action items. Megan is involved with the creation of the Communications Plan and has assisted in creating trackers in SharePoint Online for project documents.
 - *Data Improvement Project (06/2021 – present)*
Megan provides project coordination, tracks action items, schedules meetings, and develops and reviews deliverables.
 - *Payment Error Rate Measurement Reporting Year 2023 Review Project (04/2021 – present)*

Megan provides project coordination, tracks action items, schedules meetings, and develops and reviews deliverables. Megan supports the project by assisting in the creation of multiple project trackers on SharePoint Online.

- *WV Organization Development Project (07/2022 – 10/2023)*
Megan provided project coordination, tracked action items, scheduled meetings, and developed and reviewed deliverables.
- *Provider Management Support (PMS) Project (11/2021 – 03/2023)*
Megan provided project coordination, deliverable development and review, and monitored risks and issues related to all sub-projects within PMS. Megan was involved in the coordination of the Multistate Collaborative Forum to discuss current and future business needs for the purpose of knowledge sharing, lessons learned, and leverage and reuse.
- *Third-Party Liability Post-Implementation (01/2022 – 03/2022)*
Megan provided project coordination, tracked action items, scheduled meetings, and developed and reviewed deliverables.
- *Child Welfare Initiatives Phase III (12/2021 – 02/2022)*
Megan provided project coordination, deliverable development and review, and tracked action items, as needed.
- *Third-Party Liability Implementation Project (04/2021 – 06/2021)*
Megan provided project coordination, tracked action items, scheduled meetings, and developed and reviewed deliverables during the implementation phase of the project.
- *Fee Schedule and Edit Quality Review Project Phases IV and V (04/2021 – 02/2023)*
Megan provided project coordination, tracked action items, scheduled meetings, and developed and reviewed deliverables.

WV State Tax Department (10/2019 – 04/2021)

As a tax analyst, Megan performed research projects involving the collection of taxes to provide feedback on internal policies and controls. She analyzed data to produce internal reports on tax proposals, law(s), regulations, and in support of general administration of taxes; assisted in the development of tax administration and desk audit programs by providing data analysis of the taxpayer base; and provided meaningful analysis of revenue reports prior to distribution of special revenue funds and local government distributions.

Thyssenkrupp Elevator (TKE) (10/2018 – 01/2019)

Megan served as the operations coordinator for new installation and modernization. In this role, she provided project level administrative support (i.e., meeting organization, distribution of

information, meeting minutes), acted as point of contact for mechanics and subcontractors as directed by management, and assisted in documentation management.

WV State University (SU) (06/2013 – 10/2018)

- **Assistant Director, International Affairs (01/2016 – 10/2018)**

Megan worked with both degree-seeking and non-degree-seeking international students, working with a recruiting agency, evaluating foreign transcripts, creating and managing admission reports, and maintaining process and procedure manuals.

- **Assistant Director, Academic Educational Outreach (04/2014 – 01/2016)**

Megan partnered with Director to provide evidence and submit accreditation application for the National Alliance of Concurrent Enrollment Partnerships (NACEP). She provided outreach and registration for Early Enrollment/Dual Credit program and provided support to the WVSU Prison Initiative program.

- **Executive Secretary, Academic Affairs (06/2013 – 04/2014)**

Megan served as the Liaison for Academic Policies Committee, WVSU Board of Governors; managed front office for Academic Affairs, scheduled meetings and events, and worked closely with the Office of the President.

Cate Poling

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	9 years
Certifications and Education:	Regents Bachelor of Arts Degree, emphasis in English Literature, Marshall University Associate of Arts Degree, emphasis in English, West Virginia University Parkersburg Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT + MCMP-II)

Overview

Cate is an experienced researcher and writer with extensive knowledge of documentation and communication needs related to Medicaid and Managed Care Organization (MCO) billing and coding, quality measures tracking, prior authorizations, step therapies and claims documentation, change management, and system requirements. Her attention to detail has allowed her to be an invaluable resource for assisting with the drafting and interpretation of deliverables, Requests for Proposals (RFP), meeting agendas and notes, and other critical project documentation. She presents a well-developed understanding of project and system requirements, particularly as relates to Medicaid Enterprise Systems privacy and security architecture and established security frameworks, such as the National Institutes for Standards and Technology (NIST) 800-53 and Minimum Acceptable Risk Safeguards for Exchanges (MARS-E) frameworks. She demonstrates proficiency with Microsoft, Google, and Atlassian tool suites. Cate has 7 years' experience researching and documenting detailed and concise information in the insurance, clinical practice, and project management settings, with a latter focus on documenting, understanding, and articulating compliance needs throughout both systems development and project lifecycles.

Experience

BerryDunn (06/2021 – present)

As a consultant, Cate supports a variety of critical West Virginia projects and initiatives, in a multitude of capacities, such as project management, project coordination, subject matter expertise, and enterprise operational process oversight assistance. Additionally, she helps support the WV Operations Process Improvement Team in its efforts to develop, streamline, and circulate new and improved business processes specific to the WV client needs.

- **State of WV**

- **WV Bureau for Medical Services (BMS) (06/2021 – present)**

- *Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project (06/2021 – present)*

As a project coordinator and consultant for the EDS project, Cate has a variety of responsibilities, which include organizing daily meetings, overseeing daily project coordination activities, researching and developing process flows and scheduling meetings to help ensure adherence to project schedule, and providing quality control for meeting materials to satisfy the contract Service Level Agreements (SLAs). As the primary coordinator for EDS security and privacy related work, Cate communicates with the project team to organize and facilitate meetings between vendors and helps to research, document, track, and address security-related items and workflows per Centers for Medicare & Medicaid Services (CMS) Streamlined Modular Certification (SMC) guidance.

- *Data Improvement Project Phase 4 (06/2023 – present)*

As a project manager, Cate assists with refining, expanding, and initiating the DIP systems development life cycle (SDLC) body of work and preparing for the transfer of the work to the SDLC Coordination Project. This includes organizing project timelines, arranging meetings with sponsors and vendors to communicate and understand deliverable expectations and enhanced change management processes, creating reference materials, and establishing document repositories and process workflows. She facilitates meetings between BerryDunn, State, and vendor(s) to help track DIP efforts, including those related to Transformed Medicaid Statistical Information System (T-MSIS) needs and State reporting needs, reviews meeting notes, agendas, and monthly status reports, and helps draft and refine project deliverables. Cate also assists with WV engagement hours and resource planning oversight within this role.

- *Medicaid & Children's Health Insurance Program Enterprise System (MCES) Procurement Assistance Project (06/2023 – present)*

As a project consultant, Cate assists in contributing and refining system architecture design requirements content to support the State in defining system requirements and desired outcomes for MCES module procurement(s), including specifications related to interactions with the data integration hub and systems privacy and security compliance.

- *Business Intelligence (BI) and EDS Independent Security Assessment Project (05/2023 – 10/2023)*

As an intermediary consultant, Cate coordinated appropriate communication and sharing of sensitive information between project parties, helping to ensure adherence to the established project time frame and documentation needs.

West Virginia Department of Human Services (DoHS)

- *Eligibility and Enrollment Implementation Assistance –People's Access to Help (PATH) (06/2021 – present)*

As a project coordinator for the PATH project, Cate has a variety of responsibilities, which include organizing daily meetings, overseeing daily project coordination activities, researching and developing process flows and scheduling meetings to help ensure adherence to project schedule, and providing quality control for meeting materials to satisfy the contract Service Level Agreements (SLAs).

Mountain State Eye Associates (04/2017 – 06/2021)

Cate was a Certified Ophthalmic Assistant who provided direct assistance to MDs and ODs in a busy ophthalmic practice with providers who diagnose and treat ocular diseases, provide minor in-office surgical procedures, and prepare patients for cataract surgery. She performed extensive, thorough patient histories. This position involved heavy documentation/note-taking requiring measurements and special testing prior to patient-doctor encounters, including triaging, refractometry, checking visual acuity, visual field testing, checking intraocular pressure and administering ophthalmic medications to patients.

She worked directly with Medicare, Medicaid, and commercial plans to help ensure patient coverage for medications and procedures and assisted in providing cost-reducing programs to patients; provided patients prescriptions through e-prescribing and via telephone and fax; arranged pertinent diagnostic and medical procedures for patients, including obtaining prior authorizations and scheduling, and necessary transportation assistance within required time frames. Cate provided scheduling support and patient flow management; helped ensure all patients have updated, accurate HIPAA compliant registration forms on file and that all EMR systems reflect correct patient information. She assisted with administrative, clerical, patient service, and operational support duties daily.

PacificSource Health Plans (09/2015 – 11/2015)

As a provider support technician, Cate assisted provider support representatives in accurately entering and maintaining all provider data in the PacificSource database, including performing heavy documentation, note-taking, and frequent client facing duties. Cate investigated issues by obtaining and/or coordinating information from other PacificSource departments or external sources. She maintained provider updates received from returned provider mail, provider OnBase queues, and Provider Network Support email queue daily; recorded, maintain, and changed provider tax identification records, and coordinated efforts with the Finance Department related to annual 1099 filing.

Wal-Mart Supercenter (08/2014– 09/2015)

Cate was an associate providing remarkable customer service in a fast-paced working environment. She promptly answered customer inquiries in person and via telephone and followed proper procedure for handling claims. Cate was knowledgeable about all departments of the store and products within each department; helped ensure that merchandise was properly labeled, priced, and replenished as necessary; and traveled to assist in new store and existing store remodeling efforts.

Highmark WV BCBS (10/2012 – 07/2014)

As a member services representative-senior markets, Cate provided quality customer care for Medicare Advantage Plans (MAPDs) and Prescription Drug Plans (PDPs) in accordance with

HIPAA regulations and managed a high-volume workload by handling live-call member inquiries related to medical, prescription, vision and dental claims, enrollment and billing, benefits, and providers.

This position included heavy documentation/notetaking. She processed premium payment transactions; worked with providers and claims processors to help ensure claims processed correctly according to member benefits for direct pay and dedicated employer group members; and helped identify issues with benefit tools/resources. She appropriately handled or transferred members in need of assistance outside her area or to file complaints and handled general correspondence and internet inquiries in a timely, efficient manner.

In this position, Cate gained knowledge of insurance processes, claim filing, Medicare systems, first call resolution measures, and Microsoft Office programs. She assisted in developing scripts for representatives to follow during live member calls and assisted in taking meeting minutes and helping to organize information to be delivered to associates involved with special projects.

Brass Pineapple Bed & Breakfast (01/2012 – 10/2012)

As a part-time innkeeper, Cate assisted the owner in running a successful and hospitable bed and breakfast by greeting local and international guests and processing transactions; organizing events; preparing food daily; marketing; and keeping the historic home well-maintained and clean.

Wal-Mart Supercenter (05/2009 – 01/2012)

As a cashier Cate provided excellent customer service by ringing up purchases; assisting customers in locating/learning about merchandise, processing returns/exchanges; cashing government and payroll checks; and keeping front end clean, well-stocked and free of hazards. Cate assisted other departments in working freight and coordinated special projects, including a sustainability plan to implement proper recycling procedures.

Alex Stern, MPP

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	3.5 years
Certifications and Education:	Master of Public Policy, University of New Hampshire, Carsey School of Public Policy Bachelor of Arts, Political Science and Justice Studies, University of New Hampshire Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT+ MCMP -II)

Overview

Alex is an experienced project coordinator and policy analyst, specializing in Medicaid agencies and state government work. He has experience providing state agencies and private sector organizations with a broad range of support, with his extensive background in researching, analyzing, and formulating effective strategies to address complex issues paired with his strong organizational, communication, and problem-solving skills. These qualities enable Alex to leverage his expertise to drive impactful change and advance objectives.

Experience
BerryDunn (08/2022 – present)

- **State of West Virginia (WV)**

- **Bureau for Medical Services (BMS)**

- *Technical Assistance and Project Support (TAPS) Phases IV and V (11/2022 – present)*

Alex contributes to projects and task requests approved and executed under the TAPS project umbrella. This includes coordinating and tracking task requests and subproject submission and coordination with project leads on project status as a TAPS subproject and creating developing TAPS project reporting documentation. Alex also coordinates research and tasks that fall under the scope of TAPS, such as the review and impact analyses of Centers for Medicare & Medicaid Services (CMS) rules and other federal guidance relevant to Medicaid.

- **Puerto Rico Medicaid State Plan Amendment (SPA)**

- *State Plan Amendment (SPA) support for the Puerto Rico Medicaid Program (08/2022 – present)*

In this role, Alex supports clients in the design, development, and implementation of Medicaid SPAs, to align the State Plan with federal guidance, operational requirements, and client initiatives. He is responsible for managing and executing diverse activities related to the State Plan, such as monitoring regulatory

compliance, developing State Plan submissions, coordinating project work, and monitoring active SPAs. He also supports collaboration with clients and stakeholders, which is integral for the progression of SPAs through public notice, submission, negotiation, and approval processes. Alex also serves as a project coordinator, playing a crucial role in helping to ensure the delivery of high-quality work. This entails implementing a structured approach, meticulously tracking project schedules, and closely monitoring various project elements.

- **Puerto Rico Medicaid Spenddown**

- *Spenddown support for the Puerto Rico Medicaid Program (09/2022 – 11/01/2023)*

Alex leveraged his SPA Medicaid eligibility knowledge to support Puerto Rico with Spenddown eligibility. He coordinated client communication and used his analytical skills to support the client. To support the Spenddown initiative, he identified solutions to optimize Spenddown efficiency. This involved not only addressing immediate client concerns but also developing sustainable implementation approaches.

State and Local Government Project Assistant for the State of New Hampshire (NH) (05/2022 – 08/2022)

Alex worked as a policy subject matter expert advocating for Medicaid coverage for prescribed medical formula and foods and worked with the New Hampshire State Legislator, Congressmen, NH Rare Disease Advisory Council, Consultants and Policy development experts to address concerns and articulate practical solutions. Alex gathered and analyzed research regarding legislative history, state statutes and Medicaid Policy and assisted in writing legislative language to present before the NH Rare Disease Advisory Council.

Chisholm Chisholm & Kilpatrick LTD (01/2020 – 08/2021)

As a paralegal, Alex researched, investigated, and secured evidence to support client's claim benefits as well as analyzed legal documents. Alex also assisted attorneys and paralegals with case development, research and arguments for clients while also working to offer an array of highly effective services tailored to clients' needs in the areas of veteran's law, long term disability and bequest management.

University of NH Student Senate (2019 – 2021)

Alex served as a student senator and chairman of the police advisory commission and collaborated with the chiefs of both the University of NH Police and Durham Police to address student issues such as student arrest rates and student rights. Alex advocated for students and communicated the role and responsibilities of campus and local police departments and organized and facilitated meetings with the dean of students, University of NH chief of police, student body president and vice president and patrol officers from both police departments. Alex was also the chair of weekly meetings often with guest speakers.

Rhode Island State Government Internship (05/2020 – 07/2020)

As an intern, Alex identified and developed business recovery policies during the height of the pandemic, coordinated with senior government officials to work on policy innovations and solutions, and provided guidance on policy formulation, policy analysis and technical policy support.

Criminal Defense Attorney Joanne Stella's Law Office (01/2020 – 04/2020)

As an intern, Alex conducted legal research, client assistance, basic office work and assisted with preparing legal documents. Alex also reviewed law enforcement reports and charges to assist with court proceedings and had the opportunity to observe superior, district and family court proceedings.

Sophia (Sophie) Torborg, MPH

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	3 years
Certifications and Education:	Master of Public Health Administration and Policy, University of Minnesota Twin Cities Bachelor of Science Applied Economics, University of Minnesota Twin Cities

Overview

Sophie is a creative and diligent Medicaid consultant with BerryDunn. Sophie has experience with Medicaid policy analysis work as well as procurement projects. Her diverse healthcare related experience and public health education informs her current work. Sophie has worked as an administrative professional in long-term care settings, and as a communications assistant. From these experiences, she has gained attention to detail, understanding of Medicaid policy, and technical writing capabilities that strengthen her project management skills.

Experience**BerryDunn (07/2023 to Present).**

Sophia works as a Medicaid Staff Consultant using research, writing, and administrative capabilities to assist numerous Medicaid related projects focused on West Virginia, Puerto Rico, and Minnesota. Her main experience includes waiver, SPAs, legislative report, and procurement material development.

Institute for Cancer Research Prevention (10/2021 to May 2023).

As an administrative assistant, Sophia prepared communications materials including newsletters, research findings, and cancer prevention education. She utilized interviewing, survey administration, and video skills to create researcher profiles for oncology leaders.

Catholic Eldercare (08/2022 to 03/2023).

Sophia worked as an administrative student intern and spearheaded quality improvement projects including a comprehensive facility assessment for the organization, an updated employee handbook, an all-staff survey regarding benefits, and a dining improvement plan. She engaged in long-term care advocacy by meeting with state representatives and developed survey corrections for legal nursing home compliance.

BerryDunn (05/2022 to 08/2022).

As an intern with the MPG, Sophia developed an RFP for the PRMP's printing and mailing service. She also completed preliminary policy research for the PRMP.

Public Health Review: University of Minnesota (10/2021 to 01/2023).

Sophia worked as the podcase editor and produced nine podcasts focused on public health. She also crafted the interview questions for the three top interviews of the season.

International Working Group for health Systems Strengthening (07/2021 to 12/2021).

As a research assistant, Sophia worked with global colleagues to research vaccine equity and international vaccination trends. She also coordinated key meetings with leaders from the University of Brussels, Women in Global Health, and the Development Bank of Latin America.

New Perspectives Senior Living (04/2021 to 11/2021).

Sophia served as a senior caretaker by assisting with activities of daily living (ADLs) to help residents achieve the highest practical physical, mental, and psych-social well-being. She also communicated physical and emotional observations of residents to health practitioners to facilitate care plans.

Alycia Minshall, MA

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Documentation Specialist
Years of Experience Relevant to Proposed Role:	14 years
Certifications and Education:	Master of Arts in English Language and Literature, Central Michigan University Bachelor of Arts in English, Alma College Poynter American Copy Editors Society (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. She also develops and delivers presentations on various writing topics, including creating accessible documents; integrating diversity, equity, and inclusion principles in deliverables; and using PerfectIt to self-edit.

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 RFP; case studies; meeting notes; and more. She helped to ensure consistency in voice, brand, and tone across messaging channels, as well as helping to help ensure that all materials are well-written, accurate, thoroughly 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 RFP; case studies; and meeting notes. She helped to ensure that all materials are well-written, accurate, thoroughly researched, objective, concise, and focused, as well as helping to help 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, coordinated on-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.

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- 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.

Caitlin Cabral

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Documentation Specialist
Years of Experience Relevant to Proposed Role:	4 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.

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:	Bachelor of Science in Accounting, University of Southern Maine (<i>in progress</i>)

Overview

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

Experience
BerryDunn (10/2014 – present)

Carole Ann serves as a project coordinator with additional administrative duties. Selected project work includes:

- **State of West Virginia (WV)**
 - **WV Department of Human Services (DoHS)**
 - *Eligibility and Enrollment Independent Security and Privacy Controls Assessment (01/2017 – 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.
- **Puerto Rico**
 - *Enterprise Objective Monitoring and Control (09/2023 – 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 – 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 – 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 – present)*
Carole Ann worked as a project coordinator for Metro's development of their Information Security Management Program, 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 – present)*
Carole Ann currently serves as the project coordinator on the State's financial and programmatic audit of its Health Insurance Exchange completed for FYE 6/16 and in progress for FYE 6/17 to determine whether the exchange is in material compliance with 45 CFR 155.
- **Minnesota Health Benefit Exchange (MNSure)**
 - *Programmatic Audit (10/2015 – present)*
Carole Ann is the project coordinator for BerryDunn's audit team assessing whether MNSure's program is compliant with all federal requirements as BerryDunn performs the programmatic audit for the State's health insurance exchange.
- **Sacramento Municipal Utility District (SMUD)**
 - *Information Security Audit (08/2016 – 12/2017)*
Carole Ann provided documentation support and deliverable assistance for SMUD's Information Security Audit.
- **Massachusetts State Ethics Commission**
 - *CMS Planning and Implementation Services (04/2017 – 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 – 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 – 2014)

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

Emily Hendrickson

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Documentation Specialist
Years of Experience Relevant to Proposed Role:	11 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 – present)**

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 helping to ensure 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 – 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 – 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 – 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 – 04/2017)

As a tax return collector for the 2016 and 2017 tax seasons, Emily scanned client financials and helped to ensure 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 – 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 – 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 – 08/1999)

As a newspaper copy editor, Emily worked on the news desk editing reporters' stories for syntax, grammar, style, and content.

Janine DiLorenzo

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Documentation Specialist
Years of Experience Relevant to Proposed Role:	13 years
Certifications and Education:	Bachelor of Arts in Early Childhood Education, Stonehill College

Overview

Janine has more than 13 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 – present)**

Janine is responsible for proofreading, copyediting, and formatting client deliverables, including project management documents, proposals, reports, memos, presentations, and meeting notes.

Breakwater School (08/2019 – 08/2021)

Janine worked as a Preschool Teacher 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 – 06/2018)

- Program Coordinator (06/2014 – 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.

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- *AmeriCorps*VISTA, Brockton's Promise Coordinator (08/2012 – 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 wrote copy for website and social media outreach channels.
 - *AmeriCorps*VISTA, Brockton Parents Magazine (06/2011 – 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 – 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.

Jonathan (Jon) Williams

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Documentation Specialist
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 it is submitted to clients.

Experience**BerryDunn (02/2019 – 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 – 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 – 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 (mwtnnewsandviews.com), social media, and other projects. He serves on a committee that established the company's brand guidelines and now works to help ensure those guidelines are followed on all materials, internal and external.

Mitchell Equipment Corporation (02/2002 – 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 and 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 – 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.

Jordan Ramsey, MA

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Documentation Specialist
Years of Experience Relevant to Proposed Role:	14 years
Certifications and Education:	Master of Arts in English: Professional Writing, Southeast Missouri State University Bachelor of Arts in Liberal Arts and Sciences, English Literature and Creative Writing, University of Illinois at Urbana-Champaign Lean Six Sigma Green Belt Certification (LSSGB) 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, Lean Six Sigma Green Belt, and holds a MA in English: Professional Writing.

Experience**BerryDunn (07/2019 – 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. Jordan also created an in-depth training program for all new hires to learn BerryDunn style, helping ensure consistency across all BerryDunn documents.

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 – 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 – 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 – 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.

Megan Hamilton

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Documentation Specialist
Years of Experience Relevant to Proposed Role:	11 years
Certifications and Education:	Master of Arts in Literary and Cultural Studies, Carnegie Mellon University Bachelor of Arts in English, Kent State 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 – present)**

Megan works with the BerryDunn team in West Virginia to provide documentation support.

Fiverr (05/2022 – 12/2022)

Megan served as a Freelance Editor and Proofreader on professional documents for clients.

Institute of Reading Development (05/2021 – 08/2021; 05/2022 – 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 – 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 – 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 – 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 – 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 MS Excel report to support General Ledger and maintained company records and documents to meet tax guidelines.

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 presents with excellent time management skills and attention to detail that she applies to all her project work.

Experience
BerryDunn (09/2023 – present)

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

Qualtek Wireless (08/2022 – 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 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 – 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 – 05/2017)

KD worked as the admissions office assistant, 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 built rapport with potential students and parents by creating a welcoming admissions office environment and leading informational campus tours.

Appendix B: Deliverable Dictionary

Table 4: Deliverable Dictionary

Deliverable #	Deliverable Name	Deliverable Description
01	Monthly Commissioner Briefing	A monthly status update for the BMS commissioner.
02	Monthly Status Reports	Monthly Status Reports highlight project status, activities accomplished each month, and activities planned for the following month. The Monthly Status Report will also identify any known project risks or issues and will provide a record of TAPS hours allocated and available.
03	Guidance Log	The Guidance Log will provide a tracked repository of guidance federal partners at CMS publish during the duration covered by this SOW. This is a continuation of the Guidance Log developed during Phase V.
04	Project Closeout Summary	The Project Closeout Summary will include an inventory of all project documentation and deliverables being transferred to BMS at the project close. The Project Closeout Summary will also document the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member.

Appendix C: Acronyms/Abbreviations

Table 5: Acronyms/Abbreviations

Acronym/Abbreviation	Definition
APD	Advanced Planning Document
BMS	Bureau for Medical Services
CL	Commodity Line
CMA	Centralized Master Agreement
CMS	Centers for Medicare & Medicaid Services
DDI	Design, Development, and Implementation
DoHS	Department of Human Services
EM	Engagement Manager
GPM	General Project Manager
IAPD	Implementation Advanced Planning Document
LPM	Lead Project Manager
MITA	Medicaid Information Technology Architecture
MMIS	Medicaid Management Information System
QA	Quality Assurance
SOW	Scope of Work
SS	Support Staff
State	West Virginia
TAPS	Technical Assistance and Program Support
UPI	Unique Project Identifier
USVI	United States Virgin Islands


Keyword Search

For more information on how to use our keyword search, visit our help guide

Simple Search

Search Editor

☐ Any Words 

☐ All Words 

☐ Exact Phrase 

e.g. 123456789, Smith Corp

"berry dunn mcneil & parker llc" 

Entity 

Location 

Status 

☒ Active

☐ Inactive

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9

Organization Information			
Business Purpose	5416 - Professional, Scientific and Technical Services - Professional, Scientific and Technical Services - Management, Scientific and Technical 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	Termination
BERRY DUNN	TRADENAME	3/21/2011	

BERRY, DUNN, MCNEIL & PARKER,
PLLC

TRADENAME

11/5/2019

DBA Name

Description

Effective Date

Termination Date

Annual Reports

Filed For

2023

2022

2021

2020

2019

2018

2017

2016

2015

2014

2013

2012

2011

2010

2009

Date filed

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For more information, please contact the Secretary of State's Office at 304-558-8000.

Monday, June 3, 2024 — 8:51 AM

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