



Department of Administration
Purchasing Division
2019 Washington Street East
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Charleston, WV 25305-0130

State of West Virginia Delivery Order

Order Date: 05-31-2024

CORRECT ORDER NUMBER MUST APPEAR
ON ALL PACKAGES, INVOICES, AND
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CONCERNING THIS ORDER SHOULD BE
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CONTACT.

Order Number:	CDO 0511 2680 BMS2400000044 1	Procurement Folder:	1434207
Document Name:	Child Welfare Initiatives Project Management Service Phase V	Reason for Modification:	
Document Description:	Child Welfare Initiatives Project Management Service Phase V		
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: \$3,771,600.00

Purchasing Division's File Copy

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

ENCUMBRANCE CERTIFICATION
DATE: 6/3/24
ELECTRONIC SIGNATURE ON FILE

Extended Description:

Child Welfare Initiatives Project Management Services Phase V

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

Total: \$3,771,600.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$361,200.00
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

1,680 hours @ \$215 = \$361,200.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$38,880.00
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

144 hours @ \$270 = \$38,880.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$2,980,800.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2024-06-15	2025-06-14				

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

General Project Manager: Optional Renewal Year One

Hourly Rate: \$180.00

16,560 hours @ \$180 = \$2,980,800.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$390,720.00
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

 4,884 hours @ \$80 = \$390,720.00



May 15, 2024

To Whom It May Concern:

BerryDunn submitted a Staffing Plan and Scope of Work (SOW) document to assist the Bureau for Social Services by providing support for the Child Welfare Initiatives 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 (DoHS) Bureau for Social Services (BSS)

Child Welfare Initiatives (CWI) Project Management (PM) Services Phase V

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

**Charlie Leadbetter, PMP®, Principal,
Engagement Manager**

cleadbetter@berrydunn.com

**Lisa Roberts, PMP®, Lead Project
Manager**

lisa.roberts@berrydunn.com

Submitted On:

May 15, 2024



Staffing Plan and Scope of Work (SOW) for the West Virginia Department of Human Services (DoHS) Bureau for Social Services (BSS) Child Welfare Initiatives (CWI) Project Management (PM) Services Phase V

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 Social Services (BSS) with projects related to child welfare. The work completed under the Child Welfare Initiatives (CWI) Project Management (PM) Services Phase V project will be completed in accordance with the terms and conditions of the Centralized Master Agreement (CMA) Number HHR21*03 Bureau for Medical Services (BMS) PM Services contract between BerryDunn and 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

Since 2019, BerryDunn has assisted DoHS on several critical child welfare initiatives. These included completing a compliance assessment related to the Families First Prevention Services Act (FFPSA), project management assistance in creating the United States (U.S.) Department of Justice (DOJ) Agreement (the Agreement) Implementation Plan (IP), and transition planning support for the BSS as it transitioned its Safe at Home (SAH) program from the federally funded Title IV-E Demonstration Waiver to a sustainable State-funded program.

The State continues to implement aspects of the FFPSA, as well as various priorities in the DOJ agreement, including the prevention plan, restructure the model of care for residential treatment facilities, implementation, and access to home and community-based services, and sustainability of the continuous quality improvement process and reporting requirements. Over the next 13 months, the State requires ongoing project management and other operational support services centered on the aforementioned high-priority projects that BerryDunn is currently supporting and other critical child welfare reform efforts.

Project management services are focused on coordinating activities across initiatives, keeping tasks and projects on schedule, and providing decision support while directly accountable to the DoHS and BSS leadership. The BerryDunn project management team would strengthen the execution of priority BSS initiatives by helping to ensure that programmatic and policy changes are managed in a controlled manner and would support the State project teams and the people making funding, prioritization, and resourcing decisions.

In addition, BerryDunn continues to assist implementing the Quality Assessment and Performance Improvement (QA/PI) system, including a comprehensive data store that integrates and unifies child and service information, continuous analytics support, and a continuous quality improvement (CQI) plan, all of which are foundational components of the DOJ Agreement. The QA/PI work requires two distinct levels of effort; 1) The ongoing



development, finalization, and implementation of the CQI plan that was presented to the Legislature in December 2021 and updated annually thereafter, and 2) The continued design, management, and build-out of a data store with integrated and unified child eligibility, placement, and service utilization information and continuous reporting/analysis in alignment with pre-defined measures from the DOJ Agreement and CQI program-level measures that are goal posts for success and progress toward a sustainable CQI system.

The primary goals of this project include, but are not limited to:

- *Project prioritization*: creating and executing the initiative and project decision-making matrix.
- *Project management*: assisting with project/task initiation, planning, execution, control, and completion.
- *Project governance*: developing project and program structures; ensuring accountability.
- *Project status report*: communicating the status of the projects.
- *Project coordination*: sharing knowledge across teams; avoiding redundant activities.
- *Project support*: scheduling meetings; documenting notes, action items, decisions, and risks; providing quality assurance.
- *Policy updates*: updating State policies to reflect procedural and programmatic changes from initiatives.
- *Business process improvement*: analyzing, reengineering, and improving business processes to support project implementation.
- *Change management*: utilizing organizational change processes to help DoHS prepare for changes related to the initiatives and manage and reinforce the changes.
- *Data management and analytics*: continuously developing and expanding data store modules to incorporate additional data sources to support the ongoing blueprint for the DOJ Agreement and CQI data and reports, including requirements discovery, data architecture design, prototyping, development coding, technical specifications, testing, data extracts, and submitting associated code sets to the State; provide continuous ad hoc and recurring reporting and analysis support.
- *CQI*: Annually revising and further implementing the approved framework for the CQI plan. Providing support to the Office of Quality Assurance for Children's Programs to help ensure sustainability.

The CWI PM Services Phase V SOW aligns with the following Medicaid Information Technology Architecture (MITA) Road Map Transformation Goals:

- Gen 1.0 – Improve the State's effectiveness and efficiency



- Gen 2.0 – Minimize risk and maximize value from contracted services and products
- Gen 3.0 – Leverage technology to enhance performance and decision-making
- Gen 4.0 – Assess, implement, and monitor compliance with relevant federal laws and regulations
- Gen 5.0 – Ensure program quality
- CM 1.0 – Improve healthcare outcomes for members
- CM 1.1 – Establish access to data from sister-agencies and programs within DoHS
- CM 1.2 – Improve access to clinical and encounter data
- OM 1.0 – Improve operational efficiency and reduce costs in the healthcare system
- CO 1.0 – Enhance DoHS's ability to monitor contractor performance against approved measures
- PE 1.0 – Improve effectiveness and efficiency of Provider Enrollment function
- PL 1.0 – Enhance DoHS's ability to analyze the effectiveness of potential and existing benefits and policies
- MITA Business Areas: Care Management (CM), Contractor Management (CO), Operations Management (OM), Provider Enrollment (PE), Plan Management (PL)
 - Conditions and Standards (C&S): Industry Standards Condition, Interoperability Condition, Leverage Condition

1.2 Assumptions

Estimates for this SOW are based on the following assumptions:

- The State leadership team will consist of Jeffrey Pack, BSS Commissioner, and Cynthia Beane, BMS Commissioner, as the State project sponsors; and Cammie Chapman, DoHS Deputy Secretary of Children and Adult Services, as the State project lead. This effort will include cross-bureau collaboration to meet the objectives of DoHS as it relates to children's mental health reform and child welfare reform.
- The State project sponsor(s) and lead(s) will provide timely decision-making and responses to information requests from the BerryDunn project team.
- The BerryDunn leadership team will consist of Charlie Leadbetter and Lisa Roberts. Charlie will provide Engagement Manager oversight and Lisa will provide oversight as the Lead Project Manager.
- This work, which is projected to continue for 13 months.



- All project documents—including meeting outcomes, action items, risks, issues, and decisions, will be maintained by BerryDunn on an agreed-upon SharePoint site and will be shared with the project sponsor(s).
- Deliverables will be provided in an agreed-upon format.
- BerryDunn and the State will explore strengthening West Virginia (WV) partnerships with states and other territories (such as the United States Virgin Islands [USVI]) and leverage any needed tools and procedures when applicable.
- This is an hour-based SOW with 23,268 hours for the 13-month project. Any work required beyond this number of hours will require a change request to this SOW or a separate SOW.
- The child welfare initiatives covered by this scope include, but are not limited to, the following:
 - a. FFPSA prevention plan support, including installing clearinghouse prevention services throughout the State when appropriate.
 - b. Residential treatment intervention model of care restructure including qualified independent assessments, admission criteria, and policy changes.
 - c. DOJ IP tasks, including project management of the cross-bureau detailed work plans. This includes creating detailed design documents and performing project oversight, as well as the ongoing implementation of the CQI Plan, QA/PI System, data store and dashboards. The ability to utilize additional data from the data store to create cross-system reports and conduct analysis will improve once People's Access to Help (PATH) and Enterprise Data Solution (EDS) are stabilized.
 - d. Support of the SAH services including program sustainability and fidelity.
 - e. Child and Adolescent Needs and Strengths (CANS) automated system design support, development coordination, and project management.
 - f. Child-placing agencies' (CPAs') performance-based contracts, including procurement and evaluation support, contract implementation, and outcome measure tracking and data analysis.
 - g. Therapeutic Foster Care (TFC) program model development including contract amendment and evaluation support, contract implementation, and outcome measure tracking and data analysis.
- Should changes related to Information Technology (IT) systems, including changes to State or other data sources for previously implemented systems, be identified during this SOW, the State and BerryDunn will coordinate prioritization of efforts necessary to support these changes with the appropriate State and/or vendor parties.



- a. If supporting these changes requires creating or documenting detailed functional requirements including data capture, such support may necessitate either a change request to this SOW, a separate SOW, or support through another DoHS BerryDunn SOW (e.g., PATH).
- As part of CWI Phase V, BerryDunn will provide project management, subject matter expertise, and support activities for the design, development, and implementation (DDI) of multiple business initiatives and activities that DoHS might undertake during this SOW's period. BerryDunn may perform services including, but not limited to, program research, financial analysis and modeling, waiver support, regulatory analysis, federal and stakeholder negotiation, policy and procedure assistance, data store development, data analysis, and reporting and program development.
- DoHS key staff will be available to participate, when necessary, throughout the project, including, but not limited to, project initiative workgroup meetings, and ad hoc meetings.

1.3 Project Funding

The State intends to utilize the Medicaid Management Information System (MMIS) Implementation Advance Planning Document (IAPD) for the purposes of this SOW. The Centers for Medicare & Medicaid Services (CMS) has previously approved the MMIS IAPD on February 27, 2024, for the total State and federal funds in the amount of \$95,085,478 under project identifier WV-2024-01-08-MMIS-IAPDU-MITA. The estimated cost of the services delivered under this SOW is \$3,771,600 (included in the approved 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

Table 1 describes the service approach, deliverables, and acceptance criteria for BerryDunn's work, identifies BerryDunn team members responsible for conducting the work, and lists the estimated hours for completion of each key task. A high-level timeline for the activities described below is provided in Section 5.0.

Table 1: Service Approach, Deliverables, and Completion Criteria

Ref #	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
1.0	Engagement Oversight <i>Service Approach</i> Throughout the contract duration, BerryDunn will provide engagement oversight services including, but not limited to, the following: 1.1 Ongoing project oversight	Charlie Leadbetter Lisa Roberts Peter Alfrey Emily McCoy Dawn Webb	240



Ref #	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	<p>1.2 Oversight meetings</p> <p><i>Deliverable</i></p> <ul style="list-style-type: none"> D01: Monthly Briefing <p><i>Completion Criteria</i></p> <p>All parties will deem Engagement Oversight complete upon acceptance of D25: Project Close Out Summary by the project sponsor or his/her designee.</p>		
2.0	<p>Project Management Services</p> <p><i>Service Approach</i></p> <p>The BerryDunn team will be responsible for execution, control, and monitoring of project activities in accordance with the Project Management Plan (PMP). BerryDunn will provide the following services:</p> <p>2.1 BerryDunn's team will be responsible for the execution, control, and monitoring of project activities in accordance with the approved PMP (the original PMP was approved during the initial phase of the project and revised annually). Project execution activities may include program analysis and design.</p> <p>2.2 BerryDunn will provide reporting that contains (at a minimum) updates on project accomplishments during the reporting period, planned activities for the following reporting period, key decisions, issues, and risks.</p> <p>2.3 BerryDunn will provide dashboard tracking of project activities to identify the status of the analysis, decision-making, planning, and implementation. This includes the status, by provision, of federal rules and guidance and impacts identified in impact assessments.</p> <p>2.4 BerryDunn will coordinate and facilitate regularly scheduled meetings (frequency and number to be determined by the project sponsor and the project lead in conjunction with the BerryDunn project management team) to discuss the status</p>	<p>Charlie Leadbetter</p> <p>Lisa Roberts</p> <p>Shelly Brubaker</p> <p>Melissa Hicks</p> <p>Yang Ji</p> <p>Annie Messinger</p> <p>Andrea Richardson</p> <p>Michelle Weaver</p> <p>Shandia Benke</p> <p>Hailey Holden</p> <p>Kourtney Kirk</p> <p>Skye Kwong</p> <p>Cate Poling</p> <p>Courtney Rombow</p>	1,900



Ref #	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	<p>of the project. BerryDunn will use these meetings to make the stakeholders and business owners aware of risks, issues, and/or items that may require their attention and plan responses.</p> <p>2.5 BerryDunn will manage action items, decisions, risks, issues, and general project meetings.</p> <p>2.6 BerryDunn will provide meeting facilitation, preparation of meeting materials, and note-taking for BerryDunn and State-owned meetings (as requested).</p> <p>2.7 BerryDunn will manage the documentation of deliverables, in an agreed-upon SharePoint location.</p> <p>2.8 BerryDunn will facilitate a DOJ IP Weekly Touchpoint</p> <p><i>Deliverables</i></p> <ul style="list-style-type: none"> • D02: Phase V PMP • D03: Monthly Status Report • D04: Monthly Project Issue and Risk Escalation Report • D05: Monthly Decision Log • D06: Monthly Project and Workgroup Dashboard • D07: Master Project Schedule <p><i>Completion Criteria</i></p> <p>All parties will deem Project Management Services complete upon acceptance of D25: Project Close Out Summary by the project sponsor or his/her designee.</p>		
3.0	<p>DOJ Workgroup Facilitation</p> <p><i>Service Approach</i></p> <p>BerryDunn will assist with stakeholder and business owner engagement (e.g., coordination, planning, preparation, and facilitation of meetings) as well as additional tasks related to the child welfare initiatives identified in Section 1.0 of this SOW.</p> <p>The BerryDunn team will work with DoHS staff</p>	<p>Charlie Leadbetter</p> <p>Lisa Roberts</p> <p>Shelly Brubaker</p> <p>Melissa Hicks</p> <p>Yang Ji</p> <p>Lars Loren</p> <p>Annie Messinger</p>	3,500



Ref #	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	<p>to incorporate change management principles to prepare, equip, and support individuals to adopt change. In alignment with a proven methodology, BerryDunn's approach to change management will be to utilize change management processes that will continue through the life of the project.</p> <p>BerryDunn will also be responsible for facilitating meetings and utilizing change management processes throughout the duration of this project.</p> <p>Some of the meetings BerryDunn will facilitate include:</p> <ul style="list-style-type: none"> 3.1 Executive Steering Committee Strategy meetings 3.2 DOJ Workgroup Leads Meetings 3.3 Child Welfare Issues Meetings 3.4 DOJ West Virginia University Evaluation Plan Touchpoints 3.5 DOJ TFC Workgroup 3.6 DOJ Pathway to Children's Mental Health Services (CMHS) Workgroup 3.7 DOJ Reducing the Reliance on Residential (R3) Workgroup 3.8 DOJ Home and Community-Based Services (HCBS) Workgroup 3.9 DOJ Outreach and Education (O&E) Workgroup 3.10 DOJ QA/PI Workgroup 3.11 DOJ Workforce Workgroup 3.12 DOJ Subject Matter Expert (SME) meeting and technical assistance discussions. 3.13 Quality Committee meetings <p><i>Deliverable</i></p> <ul style="list-style-type: none"> • D08: Workgroup Facilitation Materials <p><i>Completion Criteria</i></p> <p>All parties will deem DOJ Workgroup Facilitation services complete upon acceptance of D25: Project Close Out Summary by the project</p>	<p>Andrea Richardson</p> <p>Michelle Weaver</p> <p>Caitlin Cabral</p> <p>Janine DiLorenzo</p> <p>KD Dobyne</p> <p>Carol Ann Guay</p> <p>Megan Hamilton</p> <p>Emily Hendrickson</p> <p>Skye Kwong</p> <p>Katie McDonald</p> <p>Alycia Minshall</p> <p>Jordan Ramsey</p> <p>Courtney Rombow</p> <p>Emily Tan</p> <p>Jonathan Williams</p>	



Ref #	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	sponsor or his/her designee.		
4.0	<p>Policy Development</p> <p><i>Service Approach</i></p> <p>Many DoHS policies will be impacted by the child welfare initiatives identified in Section 1.0. BerryDunn will assist DoHS in helping to ensure the State policies are updated to reflect procedural and programmatic changes based on the initiatives. The assumption is that the State is the ultimate owner of such policy updates and will be responsible for drafting policy language. BerryDunn will provide the following services in support of policy development:</p> <ul style="list-style-type: none"> 4.1 Conduct best practices and industry research analysis 4.2 Conduct policy review and analysis 4.3 Provide decision support and facilitation 4.4 Develop, review, and finalize draft policy language with project managers 4.5 Manage decision and change logs <p><i>Deliverables</i></p> <ul style="list-style-type: none"> • D09: Policy Review and Gap Analysis Recommendations • D10: DoHS Policy and Procedures specific to compliance with the DOJ Agreement <p><i>Completion Criteria:</i></p> <p>All parties will deem Policy Development services complete upon acceptance of D25: Project Close Out Summary by the project sponsor or his/her designee.</p>	<p>Charlie Leadbetter</p> <p>Lisa Roberts</p> <p>Shelly Brubaker</p> <p>Melissa Hicks</p> <p>Annie Messinger</p> <p>Andrea Richardson</p> <p>Sarah Renner</p> <p>Michelle Weaver</p> <p>Skye Kwong</p> <p>Courtney Rombow</p>	1,440
5.0	<p>Business Process Improvement (BPI)</p> <p><i>Service Approach</i></p> <p>Through our project management activities, workgroup facilitation, and policy development services, BerryDunn will identify business processes that might impede efficient and effective operations and service delivery. The</p>	<p>Charlie Leadbetter</p> <p>Lisa Roberts</p> <p>Shelly Brubaker</p> <p>Melissa Hicks</p> <p>Annie Messinger</p> <p>Andrea Richardson</p>	1,488



Ref #	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	<p>service focus will be on understanding the interrelatedness of people, processes, and technology, and how the business process impacts each of these three components. BerryDunn will adhere to a proven methodology in delivering BPI services, which includes the following:</p> <ul style="list-style-type: none"> 5.1 Mapping as-is business processes and providing workflow diagrams 5.2 Analyzing as-is business processes and identifying steps that might be inefficient, out of alignment with policy and/or best practices, redundant, and/or ineffective 5.3 Redesigning the business processes to streamline them, create efficiency, bring them in alignment with policy and/or best practices, and/or make them more effective 5.4 Implementing the redesigned business processes using organizational change management methodology 5.5 Establishing benchmarks and an evaluation strategy to help ensure the redesigned business processes are improved 5.6 Providing Treatment Home process redesign and implementation support 5.7 Conducting a lesson learned analysis, if requested <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> • D11: As-Is Business Process Maps • D12: To-Be Business Process Recommendations, IP, and Evaluation Strategy • D13: Lessons Learned Report, if requested <p><i>Completion Criteria</i></p> <p>All parties will deem Business Process Improvement services complete upon acceptance of D25: Project Close Out Summary by the project</p>	<p>Sarah Renner Michelle Weaver Skye Kwong Courtney Rombow</p>	



Ref #	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	sponsor or his/her designee.		
6.0	<p>SAH Programmatic Support</p> <p><i>Service Approach</i></p> <p>BerryDunn will continue work related to SAH, including, but not limited to, the following activities:</p> <ul style="list-style-type: none"> 6.1 SAH Revenue Maximization (Federal Financial Participation [FFP]) 6.2 SAH Study for Candidacy and Prevention regarding FFPSA 6.3 SAH Eligibility Process Improvement 6.4 Local Coordinating Agency (LCA) Provider Monitoring Process Improvement 6.5 Support for CANS Automated System Improvements and Management <p><i>Deliverables</i></p> <ul style="list-style-type: none"> • D14: Policy and Procedures specific to the SAH program <p><i>Completion Criteria</i></p> <p>All parties will deem SAH Programmatic Support services complete upon acceptance of D25: Project Close Out Summary by the project sponsor or his/her designee.</p>	<p>Lisa Roberts</p> <p>Annie Messinger</p> <p>Skye Kwong</p> <p>Courtney Rombow</p>	700
7.0	<p>CQI Support</p> <p><i>Service Approach</i></p> <p>BerryDunn will continue to provide CQI support to finalize and implement the approved CQI plan. In collaboration with the Office of Quality Assurance for Children's Programs and small cross-bureau program-level teams, BerryDunn will perform the following:</p> <ul style="list-style-type: none"> 7.1 Help to ensure data collection is in place for capturing child-level data 7.2 Work with program teams to establish a method for data collection, including a short-term, stop-gap solution and a long-term, systematic solution 7.3 Assist in setting up data extracts (i.e., queries) and match across data sets where possible 	<p>Charlie Leadbetter</p> <p>Lisa Roberts</p> <p>Shelly Brubaker</p> <p>Lloyd Butler</p> <p>Chris Fanikos</p> <p>Alex Flower</p> <p>Melissa Hicks</p> <p>Yang Ji</p> <p>Danielle Joslyn</p> <p>Lars Loren</p> <p>Annie Messinger</p> <p>Arisara Miller</p> <p>Andrea Richardson</p> <p>Michelle Weaver</p> <p>Fei Zou</p>	6,300



Ref #	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	<p>7.4 Assist in outlining report content, time periods, and associated visualizations</p> <p>7.5 Assist in developing ongoing reports</p> <p>7.6 Schedule and facilitate program-level data reviews</p> <p>7.7 Develop/document quality sampling review processes (as relevant)</p> <p><i>Deliverables</i></p> <ul style="list-style-type: none"> D15: Finalize key performance indicators (KPIs) and associated data collection per the CQI plan, including vendor data D16: Plan for oversight, monitoring, and accountability for DoHS staff to follow workflows, policies, and procedures. D17: Plan for oversight, monitoring, and accountability for vendor contracts <p><i>Completion Criteria</i></p> <p>All parties will deem CQI Support services complete upon acceptance of D25: Project Close Out Summary by the project sponsor or his/her designee.</p>	<p>Grady Black</p> <p>Skye Kwong</p> <p>Katie McDonald</p> <p>Dina Nash</p> <p>Courtney Rombow</p> <p>Emily Tan</p> <p>Joseph Tumblin</p>	
8.0	<p>QA/PI System and Analytics Support</p> <p><i>Service Approach</i></p> <p>BerryDunn will continue to provide analytical support and design and development of the QA/PI data store and dashboard system supporting the CQI process. The scope of these services includes:</p> <p>8.1 Collaborate with the DoHS team to identify analytical support and reporting needs and identify actionable metrics of interest</p> <p>8.2 Translate desired reporting and analyses into feasible logical specifications</p> <p>8.3 Develop and prepare dashboards, reports, and analysis for defined measures per the DOJ Agreement and CQI program</p> <p>8.4 Reflect user requirements in the design of reporting, dashboards, and underlying databases</p>	<p>Charlie Leadbetter</p> <p>Lisa Roberts</p> <p>Shelly Brubaker</p> <p>Lloyd Butler</p> <p>Chris Fanikos</p> <p>Alex Flower</p> <p>Melissa Hicks</p> <p>Yang Ji</p> <p>Danielle Joslyn</p> <p>Lars Loren</p> <p>Annie Messinger</p> <p>Arisara Miller</p> <p>Andrea Richardson</p> <p>Michelle Weaver</p> <p>Fei Zou</p> <p>Grady Black</p> <p>Skye Kwong</p>	6,300



Ref #	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	<p>8.5 Design data store architecture and develop databases and relevant transformations to validate, clean, and integrate data from multiple sources to support the QA/PI dashboards and CQI reporting; this will occur in collaboration with the DoHS Office of Management Information Services (OMIS)</p> <p>8.6 Provide user documentation and training for dashboards, and developer/maintenance documentation for the underlying databases</p> <p>8.7 Advise OMIS on dashboard and underlying data store access models for reporting, analysis, and file sharing purposes</p> <p>8.8 Support up to 20 ad hoc data analysis requests outside of routine CQI reporting.</p> <p><i>Deliverables</i></p> <ul style="list-style-type: none"> • D18: QA/PI logical specifications for performance measures per the DOJ Agreement • D19: Specifications, implementation, and deployment package for QA/PI data store to support dashboards and CQI reporting, associated data transformation code, and associated documentation for OMIS • D20: Dashboards to support programs in the DOJ Agreement • D21: Analytical support for semiannual and CQI reporting • D22: Results and documentation of ad hoc data analysis requests • D23: Documentation and training for dashboard users and analysts <p><i>Completion Criteria</i></p> <p>All parties will deem QA/PI System and Analytics Support services complete upon acceptance of D25: Project Close Out Summary by the project sponsor or his/her designee.</p>	<p>Katie McDonald</p> <p>Dina Nash</p> <p>Courtney Rombow</p> <p>Emily Tan</p> <p>Joseph Tumblin</p>	
9.0	Sub-Project Management Services	Charlie Leadbetter	1,200



Ref #	Service Approach, Deliverables, and Completion Criteria	Responsible	Hours Estimate
	<p><i>Service Approach</i></p> <p>9.1 Project management, including ongoing planning, monitoring, executing, and reporting of approved sub-projects and ad hoc tasks in accordance with project management best practices</p> <p>9.2 Ad hoc support</p> <p><i>Deliverable</i></p> <ul style="list-style-type: none"> D24: Sub-Project Management Materials <p><i>Completion Criteria</i></p> <p>All parties will deem Sub-Project Management Services complete upon acceptance of D25: Project Close Out Summary by the project sponsor or his/her designee.</p>	<p>Lisa Roberts</p> <p>Shelly Brubaker</p> <p>Melissa Hicks</p> <p>Annie Messinger</p> <p>Andrea Richardson</p> <p>Michelle Weaver</p> <p>Skye Kwong</p> <p>Courtney Rombow</p>	
10.0	<p>Project Closeout</p> <p><i>Service Approach</i></p> <p>10.1 General project closeout tasks</p> <p><i>Deliverable</i></p> <ul style="list-style-type: none"> D25: Project Closeout Summary <p><i>Completion Criteria</i></p> <p>All parties will deem Project Closeout complete upon acceptance of the D25: Project Closeout Summary by the project sponsor or his/her designee.</p>	<p>Charlie Leadbetter</p> <p>Lisa Roberts</p> <p>Yang Ji</p> <p>Annie Messinger</p> <p>Michelle Weaver</p> <p>Courtney Rombow</p>	200
Total Estimated Hours Effort			23,268

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 Optional Year 1	Role	Project Resources and Roles	Rate	Total Hours	Estimated Cost
9	EM	Charlie Leadbetter	\$270	144	\$38,880
8	LPM	Lisa Roberts	\$215	1,680	\$361,200
11	GPM	Peter Alfrey	\$180	240	\$43,200
11	GPM	Shelly Brubaker	\$180	1,560	\$280,800
11	GPM	Lloyd Butler	\$180	1,572	\$282,960
11	GPM	Chris Fanikos	\$180	1,032	\$185,760
11	GPM	Alex Flower	\$180	792	\$142,560
11	GPM	Melissa Hicks	\$180	1,680	\$302,400
11	GPM	Yang Ji	\$180	1,452	\$261,360
11	GPM	Danielle Joslyn	\$180	708	\$127,440



CL Optional Year 1	Role	Project Resources and Roles	Rate	Total Hours	Estimated Cost
11	GPM	Lars Loren	\$180	132	\$23,760
11	GPM	Emily McCoy	\$180	120	\$21,600
11	GPM	Annie Messinger	\$180	1,680	\$302,400
11	GPM	Arisara Miller	\$180	960	\$172,800
11	GPM	Sarah Renner	\$180	240	\$43,200
11	GPM	Andrea Richardson	\$180	1,416	\$254,880
11	GPM	Michelle Weaver	\$180	1,680	\$302,400
11	GPM	Dawn Webb	\$180	48	\$8,640
11	GPM	Fei Zou	\$180	1,248	\$224,640
12	SS	Shandia Benke	\$80	24	\$1,920
12	SS	Grady Black	\$80	292	\$23,360
12	SS	Caitlin Cabral	\$80	86	\$6,880
12	SS	Janine DiLorenzo	\$80	86	\$6,880
12	SS	KD Dobyne	\$80	86	\$6,880
12	SS	Carol Ann Guay	\$80	85	\$6,800
12	SS	Megan Hamilton	\$80	85	\$6,800
12	SS	Emily Hendrickson	\$80	85	\$6,800



CL Optional Year 1	Role	Project Resources and Roles	Rate	Total Hours	Estimated Cost
12	SS	Hailey Holden	\$80	60	\$4,800
12	SS	Kourtney Kirk	\$80	24	\$1,920
12	SS	Skye Kwong	\$80	564	\$45,120
12	SS	Katie McDonald	\$80	240	19,200
12	SS	Alycia Minshall	\$80	85	\$6,800
12	SS	Dina Nash	\$80	504	\$40,320
12	SS	Cate Poling	\$80	24	\$1,920
12	SS	Jordan Ramsey	\$80	85	\$6,800
12	SS	Courtney Rombow	\$80	1,680	\$134,400
12	SS	Emily Tan	\$80	504	\$40,320
12	SS	Joseph Tumblin	\$80	200	\$16,000
12	SS	Jonathan Williams	\$80	85	\$6,800
Total				23,268	\$3,771,600



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 Hours	LPM Hours	GPM Hours	SS Hours	Estimated Hours Per Month	Total Cost Per Month
Month 1	6	70	690	204	970	\$157,190
Month 2	12	140	1,380	407	1,939	\$314,300
Month 3	12	140	1,380	407	1,939	\$314,300
Month 4	12	140	1,380	407	1,939	\$314,300
Month 5	12	140	1,380	407	1,939	\$314,300
Month 6	12	140	1,380	407	1,939	\$314,300
Month 7	12	140	1,380	407	1,939	\$314,300
Month 8	12	140	1,380	407	1,939	\$314,300
Month 9	12	140	1,380	407	1,939	\$314,300
Month 10	12	140	1,380	407	1,939	\$314,300
Month 11	12	140	1,380	407	1,939	\$314,300
Month 12	12	140	1,380	407	1,939	\$314,300
Month 13	6	70	690	203	969	\$157,110
Total	144	1680	16,560	4,884	23,268	\$3,771,600



5.0 High-Level Timeline

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

Figure 1: Proposed High-Level Timeline

Task	1	2	3	4	5	6	7	8	9	10	11	12	13
1.0 Engagement Oversight													
2.0 Project Management Services													
3.0 DOJ Workgroup Facilitation													
4.0 Policy Development													
5.0 Business Process Improvement													
6.0 Safe at Home Programmatic Support													
7.0 CQI Support													
8.0 QA/PI System and Analytics Support													
9.0 Sub-Project Management Services													
10. Project Closeout													



BerryDunn Authorized Signature

As a principal of this firm in our Medicaid Practice Group (MPG) Consulting Group, I have reviewed this SOW and am legally authorized to commit BerryDunn to the work as described herein. The work and level of effort is a not-to-exceed cost. Work to be invoiced to 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
2DAAA44A0B3A477

Signature

5/15/2024

Date

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

Camille L. Chapin
Signature

5/24/2024
Date



Appendix A: Resumes

Charles “Charlie” K. Leadbetter, PMP®, CCP

Proposed Project Role:	Engagement Manager
Role at BerryDunn:	Principal
Years of Experience Relevant to Proposed Role:	28 years
Certifications and Education:	<p>Bachelor of Science in Computer Science and Economics, University of Maine Orono</p> <p>Project Management Institute (PMI) Certified Project Management Professional®</p> <p>Prosci® Certified Change Management Practitioner (CCP)</p>

Overview

Charlie is a principal and leads BerryDunn’s State Government Consulting Group. He has provided executive leadership for state agencies across the country for over 25 years. He offers project best practices in project oversight, project health assessments, QA, IV&V, project management, and engagement oversight. He has experience managing large state, high stakes projects, and utilizes project management best practices during all his engagements.

Experience

BerryDunn (1993 – present)

Charlie is the leader of BerryDunn’s State Government Consulting Group (SGPG). As a principal, he helps support government clients across a variety of states by providing project and initiative oversight and oversees a multitude of project activities, such as those related to independent quality assurance services, conducting gap analyses, aligning visions and goals with actionable strategies, performing needs assessments, developing requirements, providing quality control and management, evaluating business process redesign opportunities, grant drafting and development, funding request development, helping to ensure that programmatic and policy changes are well managed, and activities related to systems planning and procurement.

- **State of WV**

WV DoHS

- *Principal (10/2018 – present)*
 - *Child Welfare Initiatives (CWI) Project Management Services (10/2018 – present)*

WV Bureau for Public Health (BPH)

- *Principal (10/2018 – present)*
 - *Enhancing Laboratory Capacity-Enhancing Detection (ELC-ED) Project*



Management (10/2020 – present)

- *Children with Special Health Care Needs Business Process Redesign and Procedure Manual Completion (03/2020 – present)*
- *Electronic Vital Records System Implementation (02/2020– present)*
- *Emergency Medical Services Data System Procurement Support (11/2019 – 10/2020)*
- *Strategic Map Implementation Support and Performance Management/Quality Improvement Planning (10/2019 – present)*
- *HIV and Hepatitis Work Flow/Business Process Analysis and System Configuration (09/2019 – 06/2020)*
- *Public Health Accreditation Preparation Project (10/2018 – 09/2019)*

WV Bureau for Medical Services (BMS)

- *Principal*
 - *COVID-19 Contact Tracing and Testing Initiative (04/2020 – 08/2020)*
 - *Quality Assurance Oversight of MMIS and Pharmacy point-of-sale (POS) Implementation (04/2003 – 03/2008)*

WV Bureau for Children and Families (BCF)

- *Principal (08/2015 – 08/2016)*
 - *Project Management for Enterprise Content Management Project (08/2015 – 08/2016)*

WV Offices of the Insurance Commissioner (OIC)

- *Principal (06/2011 – 06/2013)*
 - *Health Insurance Exchange (HIX) Planning (06/2011 – 06/2013)*

• **Oregon SAIF (04/2021 – present)**

- *Principal (04/2021 – present)*
 - *Quality Management Services (QMS) for Workers' Compensation Claims System Implementation Program (CSI Program) (04/2021 – present)*

• **Hawai'i Department of Health (DOH)**

- *Principal (12/2020 – 10/2021)*
 - *Business Process Redesign for Behavioral Health Administration (BHA) (12/2020 – 10/2021)*

• **Michigan Department of Health and Human Services (MDHHS)**

- *Principal (11/2020 – 03/2021)*
 - *Disease Surveillance Assessment (11/2020 – 03/2021)*

• **Minnesota Department of Employment and Economic Development (DEED)**

- *Principal (10/2020 – present)*



- *Audit, Risk Assessment (including a Technical and Security Review) of Unemployment Insurance (UI) Strategic Program (10/2020 – present)*
- **Government of New Brunswick (GNB) Department of Finance and Treasury Board**
 - *Principal (10/2020 – present)*
 - *Enterprise Resource Planning (ERP) Project Monitoring Services (10/2020 – present)*
- **Wyoming Legislative Service Office (LSO)**
 - *Principal (08/2020 – 12/2020)*
 - *IT Funding Requests Study (08/2020 – 12/2020)*
- **Maine Office of Information Technology (OIT) and Office of Child and Family Services (OCFS)**
 - *Principal (07/2020 – present)*
 - *Point-In-Time IV&V for Comprehensive Child Welfare Information System (CCWIS) (07/2020 – present)*
- **Puerto Rico Department of Health (PRDoH)**
 - *Principal (04/2020 – present)*
 - *Health Information Technology (HIT)/Health Information Exchange (HIE) Support Services (04/2020 – present)*
- **Minnesota Department of Labor and Industry (MN DLI)**
 - *Principal (10/2019 – 04/2020)*
 - *Workers' Compensation Modernization Program Assessment/Audit (10/2019 – 04/2020)*
- **Vermont Judiciary**
 - *Principal*
 - *Next Generation Case Management System (NG-CMS) Planning and Implementation Services (12/2015 – present)*
- **Vermont Agency of Digital Services (ADS)**
 - *Principal (07/2012 – present)*
 - *Independent Reviews (07/2012 – present)*
Charlie has been project principal for multiple independent reviews of large IT-related initiatives for Vermont agencies. These reviews, required under State statute by the Office of the CIO, involve independently evaluating the vendor contracts, project planning and management activities, soundness of the proposed solutions, and State readiness to implement the systems.
- **Vermont Department of Health Laboratory**
 - *Principal*
 - *Project Management and Technical Support for STARLIMS Implementation (02/2017 – 06/2018)*
- **Vermont Agency of Human Services (AHS)**
 - *Principal (03/2014 – 10/2016)*



- *Uniform Reporting Requirements and Specialized Programs Project (02/2015 – 10/2016)*
 - *Health Services Enterprise Lesson Learned Initiative (03/2014 – 04/2014)*
- **Vermont Green Mountain Care Board (GMCB)**
 - *Principal (01/2014 – 05/2015)*
 - *Vermont Health Care Uniform Reporting and Evaluation System (VHCURES) Independent Review, Procurement Assistance, and Project Management (01/2014 – 05/2015)*
- **New Mexico Corrections Department (NMCD)**
 - *Principal (10/2015 – 06/2020)*
 - *COTS Offender Management System (OMS) Replacement (10/2015 – 06/2020)*
- **Indiana State Department of Health Maternal and Child Health (MCH)**
 - *Principal (08/2019 – 09/2020)*
 - *Data System Assessment (08/2019 – 09/2020)*
- **New Hampshire Department of Revenue Administration (DRA)**
 - *Principal (2016 – present)*
 - *Tax System Business Requirements and requests for proposals (RFP) Development with IV&V Services (2016 – present)*
- **Arizona Department of Economic Security/Division of Developmental Disabilities (ADES/DDD)**
 - *Principal (04/2019 – 10/2019)*
 - *Focus Health Insurance Portability and Accountability (HIPAA) TCS Compliance Project (04/2019 – 10/2019)*
- **South Carolina Department of Health and Environmental Control (DHEC)**
 - *Principal (09/2016 – 05/2018)*
 - *EHR System Planning and Procurement Assistance (09/2016 – 05/2018)*
- **Maine Department of Environmental Protection (DEP)**
 - *Enterprise Licensing Planning (06/2020 – present)*
 Charlie is leading a BerryDunn team that is assisting the DEP in planning for the replacement of its Enterprise Licensing System. This project involves the development of functional and technical requirements, performing research into licensing systems in peer states and conducting an analysis of the overall cost of acquisition. At the conclusion of the project, BerryDunn will present a comprehensive business case for the acquisition and implementation of a next generation licensing system to executive bodies.
- **Wisconsin Physicians Service Insurance Corporation (WPS)**
 - *Independent Assessment of the TRICARE for Life (TFL) Technology Modernization Project Implementation (04/2020– present)*
 Charlie is leading a BerryDunn team conducting an independent and objective



assessment of the compliance of the new TFL system with contractual and regulatory standards applicable to WPS.

- **Minnesota Management and Budget (MMB)**

- *IT Funding Model Evaluation (01/2020 – present)*

Charlie is leading a review and assessment of the current model for funding the MMB's enterprise IT systems. The engagement includes an evaluation of the current and future enterprise system needs, recommendations for developing technologies that may address these needs, and development of financial strategies to adequately fund the state's enterprise IT systems on a long-term basis.

- **Georgia Department of Administrative Services**

- *Comprehensive Business Process Review and Redesign Project (08/2019–present)*

BerryDunn is conducting an end-to-end process review, from the submission through collection of the administrative fees. Charlie is project principal for the team that is identifying major pain points in the process and providing recommendations for alleviating those pain points and avoiding current errors. The team will provide information and recommendations on successful practices and related systems used by other states for the same process.

- **Vermont Agency of Education**

- *Shared School District Data Management System Services (05/2019 – present)*

BerryDunn is providing development and implementation of the next version of the AOE's Accounting Handbook. The Handbook will be the single guidance document for all SUs/SDs and will be designed to help ensure consistent accounting practices.

- **Kentucky Department of Revenue**

- *IV&V Services for Integrated Tax System (06/2019 – present)*

Charlie serves as project principal overseeing IV&V services for the DOR's integrated tax system project. During this five-year project BerryDunn is providing documentation of issues and risks and monitoring and reporting on their resolution or mitigation. The team also makes recommendations for corrective action along with strategies to execute those recommendations.

- **Oregon Enterprise Technology Services (OR ETS)**

- *Integrated IT Service Management (ITSM) (03/2018 – present)*

Charlie is overseeing BerryDunn's project with the OR ETS department to provide business analysis services in support of the ITSM system project. Business analysis services include providing documentation, analysis, process improvement workshop facilitation, and requirements gathering. The purpose of the ITSM system project is to provide efficiency and effectiveness enhancements that could lead to OR ETS providing greater value to its customers.

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



- *Project Management for Next Generation Retail Business Systems (03/2011 – 01/2012; 04/2016 – present).*
The NHLC embarked on an initiative to document its major business processes, develop IT system requirements, and write an RFP for acquisition of a new merchandising, warehousing, and POS IT system. BerryDunn led the documenting of business processes and systems requirements for the Administration and Enforcement and Licensing Divisions of the NHLC. As follow-on work, BerryDunn provided quality assurance services related to system implementation. Charlie is currently overseeing BerryDunn's project management and oversight responsibilities for the implementation.
- **Arizona Department of Economic Security (ADES)**
 - *AALMPP Feasibility Study (04/2020 – 02/2021)*
Charlie is leading a team that is assisting the ADES in planning for the replacement of three legacy mainframe systems. This project involves performing a requirements analysis, alternatives analysis, and a cost-benefit analysis to develop a comprehensive Implementation Advanced Planning Document (IAPD) and a DDI Statement of Work to procure replacement systems.
- **Washington Health Benefit Exchange (WAHBE)**
 - *O&M System Integrator Re-Procurement Planning (05/2018 – 05/2019)*
Charlie provided leadership and oversight to this engagement to assess, define requirements, and develop an RFP for the re-procurement of an O&M system integrator for the WAHBE.
- **Hawai'i Department of Human Services Med-QUEST Division (MQD)**
 - *Organizational and Business Process Redesign (07/2017 – 04/2018)*
Charlie provided project leadership for this initiative to review studies, analyze documented operational processes, observe current workflow patterns, conduct interviews with key personnel, and gather information on current barriers to improving efficiency. The project will culminate in process improvement recommendations and strategies to implement proposed changes.
- **Vermont Agency of Human Services (AHS)**
 - *Medicaid Enterprise Solution Risk Assessment, Cost-Benefit Analysis, and Implementation Advance Planning Document (IAPD) Development (02/2011 – 04/2011)*
Charlie oversaw a risk assessment for Vermont's Medicaid Enterprise System replacement project, as the State considered alternatives for replacing its outdated Medicaid Management Information System (MMIS).
- **Massachusetts Executive Office of Health and Human Services (EOHHS)**
 - *Next Generation Systems Planning Project and MITA SS-A (05/2011 – 02/2015)*
Charlie served as project manager for Massachusetts' Next Generation Systems Planning Project. The initial effort was to complete a MITA SS-A for the Departments of Developmental Services (DDS), Mental Health (DMH), and



Public Health (DPH). The CMS MITA SS-A framework was leveraged to enable the agencies to define the current state of their major business processes and technical environment to determine which areas should be matured to meet their business needs and vision. Our team listed and prioritized the State's goals, documenting the core business processes by agency, and completing both the as-is and to-be assessment of business and technical capabilities. We then leveraged the information gained from these activities and assisted the agencies in the development of a Consolidated Requirements Document, which served as the basis for the procurement of the next generation system(s). BerryDunn then supported the development of the RFP and worked with EOHHS to procure the next generation system.

- *State Medicaid Health IT Planning and IAPD Development (10/2010– 04/2011)*
BerryDunn led the development of Massachusetts' State Medicaid Health IT Plan (SMHP), as required by the American Recovery and Reinvestment Act and HIT Economic and Clinical Health Act. The SMHP serves as the strategic vision for EOHHS as it moves forward with the development of health information technology (HIT) and information exchange activities and will become a critical component of the overall Commonwealth HIT Plan. Following the development of the SMHP, BerryDunn developed the IAPD, which set forth the Commonwealth's funding request and cost justification to CMS. Charlie served as project director for this engagement, where he was responsible for four core teams of BerryDunn and subcontractor resources, along with SMEs and other project resources.
- **Maryland Health Benefit Exchange (HBE)**
 - *IV&V for Maryland's HBE Implementation (11/2012– 04/2014)*
Charlie led BerryDunn's team to provide IV&V for Maryland's HBE implementation, to fulfill the State's health insurance eligibility and enrollment functionality and plan management, presentment, and selection. As principal, Charlie oversaw the quality of services provided by our project management team, our four core team analysts, and our pool of SMEs and analysts.
- **New Hampshire Governor's Commission on Medicaid Expansion**
 - *Consulting Services for Medicaid Eligibility Expansion Study (07/2013 – 10/2013)*
Charlie led a team that provided consulting services to a bi-partisan Commission established by the New Hampshire governor to study a possible Medicaid expansion for the State. The team's services were focused on process design for the Commission deliberations as well as report development and writing. In addition to leading the Feasibility Study project, Charlie led the writing of the Report of the Commission to Study Expansion of Medicaid Eligibility that the Commission provided to the State legislature.
- **Missouri Department of Mental Health (DMH)**
 - *Electronic Medical Record System Assessment and Long-Range Information Strategy Plan (03/2013 – 04/2013)*
BerryDunn completed an independent assessment of DMH's current information



systems, as well as future information system needs as defined by DMH management and the HITECH Act. Based on the team's evaluation, BerryDunn developed an Information Strategy Plan to identify gaps between the current and long-range business and technical needs and provide a road map for DMH to acquire, develop, and/or integrate clinical information systems to optimize efficiency and meet state/federal regulatory requirements.

- **Vermont Department of Children and Families (DCF)**
 - *Project Management and Quality Control for Vermont Family and Children Tracking System (VFACTS) Implementation (02/2011 – 06/2012)*
The Vermont DCF engaged BerryDunn to analyze the current processes and business needs for the Child Development Division's Integrated Services Data Management System. As the result of our analysis, DCF determined the need to procure a new system. BerryDunn then assisted with the development of functional requirements and an RFP document. We then provided project advisory services during the implementation of the selected system. Charlie had responsibility for the quality of work provided to the DCF, including the approval of all deliverables.
- **Connecticut Department of Public Health (DPH)**
 - *Business Analysis of Licensing and Credentialing System (10/2007 – 04/2008)*
BerryDunn conducted a business needs assessment and workflow analysis of the processes DPH completed for its licensing and credentialing system. For this project, the team documented technical and functional requirements and developed a logical system design document that outlined the necessary business, technical, and system interface requirements and created an entity relationship model. Charlie served as project manager for this engagement. BerryDunn's analysis provided the requirements necessary for DPH to create an RFP to procure a new system.
- **New Hampshire Department of Health and Human Services (DHHS)**
 - *IV&V for Medicaid Decision Support System (DSS) Implementation (01/2003 – 06/2005)*
Charlie served as project manager for BerryDunn's engagement to provide IV&V services for New Hampshire's Medicaid DSS implementation, which involved analyzing issues, risks, and system impacts and providing recommendations to mitigate these potential problems. As project manager, Charlie served as liaison with the State and vendor project teams, oversaw the services provided by BerryDunn's teams, and led the development of BerryDunn's deliverables.
 - *Project Management for Enterprise Data Warehouse Project (09/2001 – 03/2002)*
Charlie facilitated enterprise data warehouse system design discussions and developed business and technical recommendations for 24 user-defined reports for two primary divisions within DHHS. Project tasks included mapping data elements required for each report to the back-end system, determining report and data security requirements, developing report layouts and technical



specifications, and facilitating stakeholder meetings with 70 end-users that achieved both end-user support for the processes and documented business and technical specifications of each identified report. The project also included recommendations for a strategic department-wide reporting environment using warehouse data.



Lisa Roberts, PMP®

Proposed Project Role:	Lead Project Manager
Role at BerryDunn:	Manager
Years of Experience Relevant to Proposed Role:	32 years
Certifications	Project Management Institute (PMI) Certified Project Management Professional (PMP®)

Overview

Lisa is a highly capable hands-on leader with a demonstrated ability to enlist the enthusiasm and participation of internal staff and external customers. She brings expertise with public programs including Temporary Assistance for Needy Families (TANF), Supplemental Nutrition Assistance Program (SNAP), Children's Health Insurance Program (CHIP), Medicaid, Vocational Rehabilitation, Child Welfare, Home and Community-Based services, and developmental disabilities programs. Her experience includes managing government contracts and budgets, overseeing multi-state programs, and building strong professional relationships. Lisa co-leads the Child Welfare, Youth and Family Services practice area and supports various states and agencies with expertise in home and community-based service development.

Experience

BerryDunn (07/2022 – present)

Lisa is a Manager in BerryDunn's State Government Consulting Group, focusing on assisting state agencies with overall program management, procurement support, strategic plan implementation, and process redesign projects. Lisa is currently a Lead Child Welfare Project Manager.

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

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

- *Child Welfare Initiatives Project (02/2021 – present)*

- Lisa is a Lead Child Welfare Project Manager for BerryDunn and leads the team focused on statewide Child Welfare reform to improve outcomes and reduce unnecessary out-of-home placements for children across West Virginia. The Child Welfare effort requires cross agency collaboration with the Bureau for Social Services (BSS), Bureau for Medical Services (BMS), and the Bureau for Behavioral Health (BBH). This multiyear project includes program and process improvement, policy development and implementation, stakeholder engagement and significant focus on continuous quality improvement including data and reporting.

Embassy Management, LLC (05/2009 – 02/2021)

- *Executive Vice-President of Operations and Workforce Services (03/2013 – 02/2021)*

In this role, Lisa had oversight of four Operating Companies providing services in New



Mexico, California, Washington, and Oregon. Government funding sources and contracts that she was responsible for managing included:

- Medicaid Waiver Services in California, Washington, and Oregon
 - Implementation and ongoing management of Medicaid waiver residential services for individuals approved for the Intellectual Developmental Disabilities (IDD) waiver.
- Federal TANF funding for a statewide program throughout New Mexico
- Vocational Rehabilitation services in Nevada, New Mexico, Oregon, and Washington
- County-funded employment services throughout Washington
- *Vice-President of Workforce Services (06/2011 – 02/2013)*

During her time in this role, Lisa authored the winning statewide proposal to provide TANF employment and case management services for the State of New Mexico. The initial contract award was for \$8.9M; Lisa was successful in expanding the contracted services to over \$20M annually within three years.
- *Director of Workforce Services (05/2009 – 05/2011)*

Lisa was responsible for the oversight of workforce services providing employment services for individuals with developmental disabilities and other vulnerable adults. She oversaw eight county-funded contracts and programs throughout Washington State providing competitive community employment opportunities for individuals with developmental disabilities.

Arbor Education and Training, LLC (04/2003 – 04/2009)

As the Idaho State Director for Enhanced Work Services Program, Lisa provided oversight including fiscal management, contract performance outcomes, evaluation, and improvement for TANF funded services through the Idaho State Division of Welfare for two separate regions.

Idaho Division of Welfare (09/1991 – 03/2003)

During her 13-year tenure with the State of Idaho, Division of Welfare, Department of Health and Welfare, Lisa held various positions. All of the positions had responsibilities that included program implementation, eligibility and policy development and training, budget development as well as monthly review and on-going monitor of budgets, and legislative policy and budget presentations. As the Self-Reliance Trainer, Lisa was responsible for Medicaid program and policy implementation in an eight-county area. As a Self-Reliance Supervisor and Interim Regional Program Manager she was accountable for overall management of Medicaid, TANF, SNAP, Child Care, Aid to the Aged, Blind and Disabled (AABD) and home and community-based services including Medicaid funded waiver programs. The following highlight positions held during her tenure:

- Interim Regional Program Manager
- Self-Reliance Supervisor
- Self-Reliance Trainer
- Eligibility Examiner



Peter Alfrey, MBA, MA, PMP®, 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:

- *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.



Shelly Brubaker

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	21 years

Overview

Shelly has 25 years' successful management experience in competitive and diverse environments, including working with adults and children with intellectual disabilities, early childhood education, personnel management, and medical management. She has strong skills developing, refining, and implementing policy and procedures that meet Medicaid and customer standards. She is familiar with directing and participating in developing strategic plans that create new service lines, along with expanding current service options.

Experience

BerryDunn (11/2022 – present)

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

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

- *CWI Project Management Services (11/2022 – present)*

Shelly works as a Senior Consultant for the State Government Practice Group focused on Health and Human Services. She provides subject matter expertise as they relate to residential and workforce initiatives. Shelly's focus is on statewide child welfare reform to improve outcomes and reduce unnecessary out-of-home placements for children across WV. The child welfare effort requires cross agency collaboration with the Bureau for Social Services (BSS), Bureau for Medical Services (BMS), and the Bureau for Behavioral Health (BBH). This multiyear project includes program and process improvement in the residential model continuum of care. Shelly works closely with BSS staff and community stakeholders to help ensure children receive the least restrictive most appropriate intervention.

- **Arizona Department of Health Services (ADHS)**

- *Operational Needs Assessment Project Management Services (05/2023 - 10/2023)*

Shelly provides project management services to the ADHS licensing bureaus by completing background documentation reviews, creation and analysis of web surveys, hosting discovery sessions, participating in biweekly status meetings, and creating presentations that helped to define a path forward for ADHS as they looked to restructure and refine their policies, standard work, and bureaus.



Sevita (07/2021 – 11/2022)

Shelly worked as the Executive Director to oversee the operational outcomes for Idaho and Nevada while maintaining Medicaid regulatory requirements, as well monitor contracts in 11 cities, provide direct supervision to 15 management level staff, 1,200 direct support staff, and 465 participants. She partnered with customers to identify areas of deficiencies to develop plans of actions to rectify situations in a timely and efficient manner with sustainable outcomes. She identified and implemented direct cost-saving measures to benefit the company while maintaining high quality programs and teams. Shelly completed quality initiatives within designated programs, including health and wellness visits, vaccinations, monitoring and tracking home visits and safe environments, tracking and trending incidents, outcomes, and overall risk. She governed safety and policy committees to help ensure continued monitoring and compliance with a Medicaid-funded environment.

SL Start and Associates, LLC (10/2001 – 07/2021)

- *Executive Director (02/2019 – 06/2021)*
Shelly oversaw the operational outcomes for Idaho, Oregon, and Nevada, as well monitor contracts in eight cities, provide direct supervision to nine management level staff, 1,011 direct support staff, and 342 participants. She participated in community activities and committees committed to providing opportunities to individuals with intellectual disabilities, including current Idaho Association of Community Providers residential habilitation subgroup director. She also collaborated with external partners including licensing and Medicaid counterparts on initiatives such as Negotiated Rule Making Rate Setting Methodology, policy development, and other key topics.
- *Idaho State Director (12/2013 – 01/2019)*
Shelly oversaw operational outcomes, worked in conjunction with external and internal customers to identify areas of deficiencies, developed plans of actions to rectify situations in a timely and efficient manner, and provided extensive time and hands-on commitment to transitioning multiple locations in workflow and process changes. She created teams and leaders that are committed to providing exceptional quality and customer service, as well as participated in professional coaching sessions that enhanced personal leadership skills and allowed the opportunity to work to develop team members and build on their strengths.
- *Operations Manager (11/2012 – 11/2013)*
Shelly oversaw operational outcomes for five regions, four cities, and three service lines, collaborated with external customers to identify areas of deficiencies and develop plans of actions to rectify situations in a timely and efficient manner, and participated in community activities and committees that are committed to providing opportunities to individuals with intellectual disabilities, including Collaborative Work Group, Consortium of Idahoans with Disabilities, and Idaho Association of Community Providers. She provided extensive time and hands-on commitment to transitioning multiple locations in workflow and process changes.



- *City Director (02/2012 – 10/2012)*
Shelly oversaw operational outcomes, partnered with external customers in accordance with Idaho Administrative Procedures Act (IDAPA) to strengthen their Intermediate Care Facilities/Intellectual Disabilities programs and bring them into consistent reporting compliance, and assisted in locating and participating in weekly project management activities of new office location. She participated in multiple committee activities within the company and in the community that led us to enhanced services and as a key player in the Developmental Disability field.
- *Branch Manager/Marketing & Business Development Director (07/2007 – 01/2012)*
Shelly worked in conjunction with a strategic planning team to create annual budgets, which included fiscal plans, referrals, recruitment, and marketing. She supervised management staff with scheduling, recruitment, training, and coaching. She submitted accurate payroll and billing weekly and other detailed monthly reports covering outcomes, growth, and profitability. Shelly also maintained partnerships and communication with Department of Health and Welfare licensing, Medicaid, and targeted service coordination agencies to help ensure customer satisfaction.
- *Branch Manager/Human Resources Assistant (10/2001 – 03/2006)*
Shelly oversaw the day-to-day operations of \$875,000 branch office, provided quality customer services to adults with developmental disabilities, and worked in conjunction with a strategic planning team to create annual budgets, which included fiscal plans, referrals, recruitment, and marketing. She helped to ensure compliance with all Equal Employment Opportunity Commission, Operational Safety and Health Administration, HIPAA Act standards and state regulations and contracts.

Primary Health Medical Group (03/2006 – 07/2007)

Shelly worked as a Clinic Administrator to oversee the daily operations of a medical clinic that managed the weekly submission of payroll and billing, including Medicaid, Medicare, private insurance, and Tri Care. She monitored quality assurance through designated processes to help ensure procedures, equipment and practices were in alignment with HIPAA, Drug Enforcement Agency requirements, along with state and federal regulatory rules.



Lloyd Butler, MS

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	19 years
Certifications and Education:	Master of Science in Mathematics, Northeastern University Bachelor of Science in Mathematics and Computer Science, Ithaca College

Overview

Lloyd is a senior consultant in the Health Analytics Practice at BerryDunn. He is an experienced data and IT professional with efficient programming, process and project management, business intelligence, and cybersecurity skills. Lloyd works collaboratively with clients to help them design and implement a shared vision by utilizing project management experience and a familiarity with agile frameworks, daily standups, sprint planning, and release planning. He has extensive experience working with and building relationships with a wide range of stakeholders. Lloyd is proficient with numerous applications, such as SQL Server Management Studio, SQL Developer, Mirth, Git, Asana, Jira, Slack, Sisense, Okta, SharePoint, Microsoft Office, and Microsoft Visual Studio .NET. His proficiency in programming language also includes Structured Query Language (SQL), Statistical Analysis System (SAS), Python, Bash, PL/SQL, Perl, JavaScript, CSS, HTML, XML, VBScript (Active Server Pages), Visual Basic, VB for Applications, Java, C++, and C#.

Experience

BerryDunn (12/2020 – present)

Lloyd works within the Health Analytics Practice Group, as a senior consultant, to support clients to improve their workflows and quality of work, helping them achieve future visions by analyzing existing applications and determining methods to increase their efficiency. This requires identifying business requirements, analyzing data, and understanding quality needs, as well as designing and implementing the solution. Lloyd deftly moves between various tools to complete these ends, often working with tools such as SQL Server, Oracle, and SAS.

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

WV Department of Human Services (DoHS)

- *Child Welfare Initiatives (CWI) Project (01/2021 – present)*

Lloyd supports the CWI project through the data lifecycle needed for the project. He meets regularly with data providers, analysts, and cross-bureau teams including the Bureau for Medical Services, Bureau for Behavioral Health, Bureau for Social Services, and the Office of Quality Assurance. He receives cross-bureau and provider level data, designs the data mart, writes code to load and



transform the data, performs cross-bureau ad hoc analysis, and supports the team with project management and internal process improvement.

- *Data Improvement Project (DIP) (10/2021 – 10/2022)*

Lloyd loaded and organized raw X12 EDI (Electronic data interchange) into a data store for the analytic team to consume. This required using Mirth to consume and transform the data into a useable form. He worked with the analysts to understand their data storage requirements and review of the final data store.

High Value Healthcare Collaborative (HVHC), Dartmouth College (2013 – 2020)

As a senior manager of IT operations, Lloyd wrote and suggested improvements to complex SAS and SQL code. In his role as infrastructure manager, he was responsible for server environment stability and security and maintained all server-based software installations. Lloyd managed external vendors when conducting security assessments, audits, penetration tests, and other activities necessary to secure HVHC data. He was also responsible for overseeing the implementation of security improvements to maintain strict CMS requirements and for developing and maintaining security plans and related documents. Lloyd was an effective and collaborative mentor to analysts and programmers.

Northern New England Accountable Care Collaborative, Dartmouth College (2012 – 2015)

Lloyd served as a lead programmer and technical liaison, managing a wide variety of IT, analytic, and business tasks to support the start-up from the onset. He worked closely with a consultant company to implement a new web-based patient care product and he managed technical relationships with multiple clients and vendors. Lloyd also provided day-to-day technical and user support for co-workers and worked closely with leadership to legally wind-down the organization.

Health Dialog (2005 – 2012)

In this role, Lloyd was the designer and programmer of a Physician Performance Measurement System (PPMS). The PPMS was used to generate reports for Maine Patient Centered Medical Home programs. Lloyd was responsible for bimonthly PPMS releases (testing, change request management, rollout) and documented PPMS and presented technical aspects of PPMS to company departments. In addition, Lloyd implemented Healthcare Effectiveness Data and Information Set (HEDIS) and proprietary measures for use by PPMS and worked with the operations team to make HEDIS measures available company wide. Lloyd also wrote stock programs to aid in analysis and streamlined existing processes to improve efficiency and usability.

General Dynamics Information Technology (previously Anteon) (2003 – 2005)

While at Anteon, Lloyd was exposed to and adapted quickly to new technologies and served as a liaison between government customers and the project team. As a research mathematician and programmer, he was responsible for analyzing, coding, and modifying mathematical models for military use.

Erie Scientific (2000 – 2003)

As a quality control consultant, Lloyd created and modified advanced Excel workbooks and



Access databases to improve worker efficiency and assist with quality assurance. Lloyd worked closely with users, training them on how to use these tools most effectively. He also wrote and tested validation suites for FDA controlled databases.



Chris Fanikos, MPH

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	6 years
Certifications and Education:	Master of Public Health in Public Health Policy, Yale University Bachelor of Arts in History and Middle Eastern & Islamic Studies, New York University

Overview

Chris is an accomplished public health professional with experience in corporate, healthcare, and educational organizations. He has strong skills in solutions architecting, research and data analysis, and project management and program development. He has worked with multiple state Medicaid and social services agencies in designing, developing, and implementing solutions for data collection and analysis to support reporting and research related to Medicaid operations, health policy, and behavioral health.

Experience

BerryDunn (11/2021 – present)

Chris is a senior consultant in the BerryDunn Health Analytics Practice Group (HAPG) Data Management & Strategy (DMS) team, where he helps clients by designing and implementing data models, ETL processes, and data warehouse design to support analytic and reporting requirements. Chris provides a wide range of data-related support, including profiling and quality validation testing, compilation, aggregation, and analytics, as well as data governance and master data management. Chris's work includes various analytic projects with the West Virginia Bureau for Medical Services (BMS), enterprise data warehouse development with Puerto Rico's Programa Medicaid de Puerto Rico (PRMP), and Medicaid Enterprise Systems (MES) operations reporting with the New Jersey Department of Human Services. Chris also supports team members by providing guidance on statistical modeling and advanced data visualization efforts. Chris is the lead Tableau developer for BerryDunn's internal reporting efforts and is responsible for creating and maintaining the reporting tools used by firm leadership.

University of Connecticut, Analytics & Information Management Solutions (AIMS) (01/2021 – 11/2021)

Chris worked as a Solutions Analyst to develop data pipelines using Microsoft Azure services (Blob storage containers, Azure Data Factory, Azure Databricks) and NextGen (Mirth) Connect for ingesting and parsing clinical data to aid the Connecticut Department of Social Services (DSS) in analyzing the impact of COVID-19 and State telehealth policies on utilization and clinical outcomes among Medicaid beneficiaries; ingested, parsed, cleaned, and profiled ~2.1 million Consolidated Clinical Document Architecture (C-CDA) files from Connecticut FQHCs. He



designed and implemented analytic data models using ingested clinical data; developed interactive, dynamic Tableau dashboards using these models to meet stakeholder-defined analytic requirements, including time trend and geospatial analyses.

University of Connecticut, AIMS (08/2019 – 01/2021)

Chris worked as a Health Policy & Business Analyst to query extracts of the Connecticut All Payer Claims Database, including Medicaid claims, using Python and SQL to develop analytic data views. He developed dynamic, interactive dashboards in Tableau using these views. Chris also served as a lead business analyst for a variety of projects in support of the Connecticut DSS, Department of Public Health (DPH), and Office of Health Strategy (OHS), including the establishment of the State's Health Information Exchange (HIE) and grant-funded research focusing on telehealth and behavioral health utilization during COVID.

Brigham & Women's Hospital, Division of Pharmacoepidemiology & Pharmacoeconomics (05/2018 – 06/2019)

Chris worked as a Research Trainee devise and conducted an independent research project relating to opioid and Opioid Use Disorder (OUD) treatment prescribing rates in Medicaid programs between 2008 and 2017. He scanned all 50 state legal codes for legislation on prescription drug monitoring programs, prescription limitations, and continuing medication education mandates and merged the data with Medicaid State Drug Utilization claims data into longitudinal datasets. He ran multivariate regressions and interrupted time series analyses on prescribing and policy data sets in R/SAS, drafting the results of these analyses for publication in a major American public health journal.

HAVEN Free Clinic (12/2017 – 02/2019)

Chris worked as the Co-Director of Pharmacy at the HAVEN Free Clinic, a student-lead and -operated free clinic based out of the Yale medical professional schools that aimed to treat New Haven's under- and uninsured populations. Chris managed all aspects of the clinic's in-house pharmacy, including maintaining the formulary, overseeing medication dispensing, consulting with medical teams on cost-benefit decisions, researching CT Medicaid eligibility options and medical coverage, and ensuring volunteer and patient satisfaction. He developed and conducted internal quality improvement projects on fill/delivery efficiency and medication adherence.

Rennert International (08/2015 – 08/2017)

Chris worked as a Manager in Sales & Marketing to establish, maintain, and develop relations with over 500 vendors and business partners. He compiled and analyzed data on partner performance and market trends for use in product development.



Alex Flower

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	5 years
Certifications and Education:	Bachelor of Science in Business Administration, Grand Canyon University

Overview

Alex has extended experience in advanced data analysis and project management, demonstrated through developing comprehensive data analysis models and leading projects from start to finish while focused on continuous improvement. He presents with deep knowledge and experience related to managing data quality-related issues within complex Medicaid Management Information Systems (MMIS) modules, helping States to ensure data integrity, confirm logic, track utilization, and analyze trends related to healthcare and social services data. Alex demonstrates keen attention to detail through managing and supporting the development of streamlined communication and ticketing process templates, helping to improve cross-sector communication and promote best documentation practices throughout state agencies and across systems.

Experience

BerryDunn (10/2022 – present)

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

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

- *Child Welfare Initiatives Project Management Services (10/2022 – present)*

Alex functions as a business analyst and data analyst assisting the project team with requirements gathering and data analysis to support development of dashboards and reports to aid in tracking and reporting for critical State social services and Medicaid-related programs. He works closely and communicates with the DoHS Office of Quality Assurance for Children's Programs (OQA), Bureau for Medical Services (BMS), Bureau for Behavioral Health (BBH), Bureau for Family Assistance (BFA), Bureaus of Social Services (BSS), and DoHS vendors to gather information and specify and negotiate requirements for data collections and reporting.

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

- *Data Improvement Project (10/2022 – present)*

Alex functions as a data analyst assisting with data quality analysis and data profiling activities across social service and Medicaid Enterprise



systems, including WV's Enterprise Data Solution (EDS). He analyzes data pipeline gaps, identifies data lineage integration issues, and communicate findings to BMS and BMS's MMIS and data warehouse system vendors.

Mercer (02/2019 – 10/2022)

- *Associate Consultant (04/2021 – 10/2022)*
Alex worked as a senior business and health informatics analyst with multiple state Medicaid agencies, including the Commonwealth of Virginia, Commonwealth of Pennsylvania, Colorado, Arizona, Florida, and Delaware to support their rate-setting processes. Alex developed and managed advanced Medicaid data analysis models that aided in development of rates, risk adjustment, rebates, specialty pharmacy pricing, and cost savings. He streamlined and improved communication and project management practices across teams. He developed and maintained a high-cost drug analysis that determines costly conditions across Medicaid membership to measure and account for trends in state-wide factors and associated health costs. Monitored analysis use across teams. Alex managed issues and improvements backlog that aided in continuous product improvement and improved data integrity.
- *Government Consulting Senior Analyst (04/2020 – 03/2021)*
Alex worked as a business and informatics analyst with multiple state Medicaid agencies, including the Commonwealth of Virginia, Commonwealth of Pennsylvania, Colorado, Arizona, Florida, and Delaware to support their rate-setting processes. Alex developed and maintained mental health data analyses for large quantities of Medicaid data focused on utilization review and healthcare outcomes. He improved documentation and program management practices that aided in cross-sector communication, analysis version control, and overall project quality. He led root cause research and documented results into business insights that increased product integrity; presented findings with team leads, cross-sector partners, and external clients. Alex developed ticketing request template for analyses that led to better cross-sector collaboration, clarity, and documentation.
- *Informatics Analyst (02/2019 – 03/2020)*
Alex worked as an informatics analyst with multiple state Medicaid agencies, including the Commonwealth of Virginia, Commonwealth of Pennsylvania, Colorado, Arizona, Florida, and Delaware to support their rate-setting processes. Alex increased data processing and cleansing logic efficiency by 25% for large quantities of Medicaid data by implementing programming best practices, utilizing relational databases, and developing comprehensive documentation. He developed utilization review analyses using healthcare data, relational databases, and data from disparate sources. He created validation models that measured the validity of data and tracked key metrics on a quarterly and monthly basis.



Melissa Hicks, MA, LSSGB

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	12 years
Certifications and Education:	Master of Arts in International Relations, Hult International Business School Bachelor of Arts in Cultural Anthropology, Northern Arizona University Lean Six Sigma Black Belt (LSSBB)

Overview

Melissa is an experienced senior consultant with a history of working with state agencies on reporting, development, and implementation related to state social services and Medicaid programs and initiatives. She presents with in-depth knowledge and demonstrates keen understanding of child safety agencies, mental health support organizations, and student preparation programs. Melissa participates on project teams that provide services related to project management and oversight of critical program implementation for state governments. She analyzes clients' scope of work and needs with the goal of developing adequate work plans. She reviews, develops, and helps to ensure delivery of client deliverables, including complex data analyses and reports, status reports, and presentations. Melissa serves as a subject matter expert (SME) for child welfare-related topics, with a focus on the implementation needs for Comprehensive Child Welfare Information Systems (CCWISs). Melissa's expertise is reflected in her eight-year tenure with the Arizona Department of Child Safety, during which time she supported children and families, as well as state agencies, vendors, and partners, as they navigate the intricate, interconnected, and data-driven world of state agency programs, including Medicaid, CHIP, and child welfare and safety programs.

Experience

BerryDunn (07/2022 – present)

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

WV Department of Human Services (DoHS)

- *Child Welfare Initiatives Project (07/2022 – present)*

Melissa serves as a general project manager on this engagement. Melissa provides project management services, needs assessment/gap analyses, business process analyses/redesign, guidance on continuous quality improvement, and oversight of program implementation related to child welfare for the state of WV. Melissa collaborates with the Bureau of Medical Services (BMS) to ensure Medicaid waiver and state plan service materials are updated consistently and aligned appropriately across the Department through regular meetings, policy and



programmatic material updates, and program data reviews.

- **Arizona Department of Health Services (ADHS)**

- *Health Care Institutions (HCIs) Operational Assessment (06/2023 – 11/2023)*

Melissa served as a SME on this project and supported the team by engaging with interested parties, performing research, conducting discovery sessions, making recommendations, and developing a needs assessment for ADHS' licensing of HCIs, with a primary focus on nursing care institutions and behavioral health residential facilities.

Arizona Department of Child Safety (05/2014 – 07/2022)

- *Management Analyst (04/2018 – 07/2022)*

Melissa generated data reporting and visualization using Excel, PowerBI, and PowerPoint to identify trends, monitor performance, and analyze opportunities for improvement across the agency. She developed initial versions of Statewide Scorecard and Visual Management using Adoption and Foster Care Analysis and Reporting System (AFCARS), Child and Adolescent Needs and Strengths (CANS), court systems database data, law enforcement data, internal Department Key Performance Indicators (KPIs), and Arizona's Medicaid system, Arizona Health Care Cost Containment System (AHCCCS), data. Melissa reviewed and analyzed AHCCCS Medicaid data to help ensure adherence to established processes and policies, working with the Medicaid agency and its partners to identify barriers and address issues. She created the process and standard work that help to ensure felony child abuse is adequately investigated throughout the state per Arizona statute, gathered requirements from end-users, developed initial data corrections matrix and database, and designed workflows and operations charts, documenting existing procedures to identify opportunities for continuous improvement.

- *Program Specialist (04/2017 – 04/2018)*

Melissa developed pilot versions of Section Huddle Board and Visual Process Adherence tools, allowing management to have data-based conversations around continuous improvement and problem-solving. She produced reports and data visualization in Excel using Tableau, Access databases, and statewide databases to identify trends and validate data entry, reducing error rate by 60%. Data reviewed and utilized included AFCARS, CANS, court systems database data, as well as internal Department KPIs. Melissa also reviewed and analyzed AHCCCS data to ensure adherence to established processes and policies. She created and led lean management, data analysis, and problem-solving training for agency leadership and conducted case reviews using Child and Family Services Review (CFSR) indicators and compiled findings for management review. She also performed supervisory duties, including staffing with child safety specialists to determine child safety, and reviewing documentation of specialists' findings and reports to the courts.



- ***Child Safety Specialist (05/2014 – 04/2017)***

Melissa developed a pilot program to reduce caseload for investigative field staff that was adopted throughout the Department. She investigated reports of child abuse and/or neglect by gathering information regarding families and communicating with children, parents, relatives, and service providers. She utilized diagnostic tools to assess child safety and document risk factors impacting families. She connected children and families with services and community resources, including individual & family counseling. Melissa assisted children and families in navigating access to state Medicaid services through AHCCCS. She monitored and documented ongoing participation in, and results of services, and facilitated communications between medical, educational, and legal providers to help ensure that children and families received appropriate services and interventions.

Holy Family International College Preparatory Program (01/2013 – 05/2014)

Melissa served as Program Supervisor and Student Support Specialist to manage a staff of 30 in a residential setting. She created and led organization-wide training courses on cultural diversity, developed and implemented college preparation timeline and materials for staff and students, and created individual goals and monitored case plans for international students.

Pressley Ridge Day School (11/2011 – 12/2012)

Melissa served as a Mental Health Specialist and a Special Education Aide to create individualized case plans addressing mental health needs for young people in a private school/partial hospital program, ranging in age from 12-21 years. She developed and implemented lesson plans that included skill streaming and therapeutic activities, counseled students in crisis (encouraging conflict resolution and positive decision-making through individual and group counseling sessions), and led clinical meetings with executive leadership, family members, and outside agencies/school representatives to discuss student progress. She assisted children and families in accessing community services by identifying resources and working with community partners, including providing support with accessing medical care and treatment through Children's Health Insurance Program (CHIP), individual and family therapy and counseling, and community resources (food boxes, housing assistance, employment assistance).

Naturopaths International (03/2008 – 06/2010)

Melissa served as an International Program Development Intern to develop three individual programs to provide ongoing medical and mental health care for patients in underserved areas in Phoenix, AZ, the Navajo Nation- Chinle, AZ, and Nepal, Kathmandu. She raised over \$75,000 in funds through coordinating charity events and maintaining relationships with donor network and led patient counseling sessions for women and children in local shelters, focusing primarily on domestic violence and substance abuse.



Yang Ji, MPH, MS

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Manager
Years of Experience Relevant to Proposed Role:	18 years
Certifications and Education:	<p>Master of Public Health, Biostatistics University of South Florida</p> <p>Master of Science in Demography, East China Normal University</p> <p>Bachelor of Science in Economics, China Youth University of Political Sciences</p>

Overview

With close to two decades' experience in healthcare data analytics, Yang brings extensive expertise in the application of data management, business intelligence, and analytics to healthcare data ecosystems and financial, operational, and clinical domains.

As a senior manager and co-lead of BerryDunn's Data Management and Strategy Practice, Yang helps managed care, government, and provider organization clients discover, plan, design, and implement data management, warehousing, and analytics strategies and solutions.

Experience

BerryDunn (09/2018 – present)

Yang is a manager in BerryDunn's Health Analytics Practice Group (HAPG).

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

- **WV Department of Health and Human Services (DoHS) (11/2020 - present)**

- *Child Welfare Initiatives Project (11/2020 - present)*

Yang leads the project scoping, planning, management and directs a team of staff supporting all aspects of data, reporting activities and the buildout of a data store and dashboard system for DoHS's Bureau for Social Services (BSS). Yang supports the CWI project through the entire data lifecycle, i.e., system and program data collection, data quality assurance, data transfer/exchange setup, and data integration solution build needed for the project. He meets regularly with data providers, analysts, and cross-bureau teams including the Bureau for Medical Services, Bureau for Behavioral Health, BSS, and the Office of Quality Assurance.

- **Private Health Insurer and Exchange Participant (09/2018 – 03/2021)**

- *Technical Architecture Services Project*

Yang served as a subject matter expert on a project providing technical architecture services to a health insurer and exchange participant. The project supports revising the insurer's existing data model, developing a more coherent and complete model, initially for operational data centralization and aggregation



and subsequently for data warehouse and analytic efforts.

- **Private Medicaid Behavioral Health MCO (09/2018 – 09/2021)**

- *Medicaid MCO Management Services Project*

Yang serves as the engagement manager, data architect, and data strategy advisor to the Medicaid MCO. His work includes roadmap planning, requirement discovery, data model design, project steering and management to help clients strategize and implement data management and analytics solutions, i.e., data warehouse, specialized data mart, operational data store, data lake, and the business intelligence layer to deliver reporting and analytical tools. With extensive content knowledge in healthcare programs, Yang also directs data analysis plans and provides deep financial and operational insights to the MCO client. stakeholder's data and analytical requirements gathering, and the design, development, and implementation of the data warehouse and analytics data structures, including the data and process to support the Pennsylvania Medicaid and Department of Health reporting submission.

- **New Hampshire Insurance Department (NHID) (09/2018 – 03/2019)**

- *NHID Project*

Yang served as a project manager for a project assisting NHID in evaluating, selecting, and implementing population risk profiling and assessment analysis tools.

Blue Cross Blue Shield of Arizona Advantage (05/2016 – 09/2018)

As head of the data analytics and business intelligence department, Yang managed enterprise end-to-end data, reporting, and analytics functions. He oversaw the entire data management and reporting operations in supporting CMS compliance reporting, HEDIS, STAR rating, risk adjustment revenue, FWA etc. functions/initiatives. He chaired enterprise data governance and reporting review/steering committees.

Wellcare Health Plans Inc. (08/2010 – 05/2016)

Yang served as a lead analytics programmer and oversaw profitability data and reporting function for 11 markets and 26 lines of business in supporting company's financial close. He also managed a broad data analytics portfolio in supporting actuarial reserving and forecasting, risk adjustment revenue, and quality of care reporting.

University of South Florida (07/2005 – 05/2010)

Serving as a research associate with the State Data Center on Aging and the Florida Mental Health Institute, Yang led the build of data mart and conducted research on the cost-effectiveness and health outcome of Florida Medicaid waiver programs and authored and presented working papers at regional and national conferences.



Danielle Joslyn, PMP®

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	16 years
Certifications and Education:	Bachelor of Arts in Mathematics, University of Southern Maine Project Management Institute (PMI) Project Management Professional (PMP®)

Overview

Danielle is an experienced healthcare data analyst and project manager with excellent data analysis and evaluation skills. She is highly skilled with the management of patient claim information, building data warehouses, and performing data analysis in Statistical Analysis Software (SAS) and Microsoft SQL based environments and has the proven ability to implement and manage multiple projects, while maintaining high quality standards and providing value-added service to the client. She has shown leadership experience in team-based environments and the ability to work independently to develop new processes and strategies to meet client needs. She has experience across various sectors of the insurance industry including Commercial health plans, Medicare Advantage plans and Medicaid Managed Care Organizations.

Experience

BerryDunn (11/2021 – present)

Danielle is a senior consultant with BerryDunn's Health Analytics practice group.

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

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

- *Data Improvement Project (DIP) (11/2021 – present)*

Danielle provides analytic support for DIP and has built the data reconciliation process that will assist the State in understanding and addressing data quality and usability issues affecting its Medicaid program.

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

- *Child Welfare Initiatives Project Management Services (07/2022 – present)*

Danielle participates in the implementation of the Quality Assurance/Performance Improvement (QAPI) data store to support the Child Welfare Initiatives. She coordinates the requirement gathering and business analyses needed to build a data reporting system and



dashboard to enable the State to reach critical milestones in the agreement.

- **Arizona Healthcare Cost Containment System (AHCCCS)**

- *Forensic Accounting and Auditing (04/2023 – present)*

Danielle leads the claim data analysis and creates reports to support the claims analyst in review of provider reimbursement and billing practices in its Medicaid program.

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

- *Recovery Audit Contract (RAC) Examination (08/2023 to present)*

Danielle provides analytic support for the Colorado OSA Recovery Audit Contract project. She participates in the business analysis and requirement gathering to support claims analysis.

Cotiviti (10/2016 – 11/2021)

Danielle worked as a Senior Implementation Manager and Product Manager to coordinate and manage projects for new clients and existing client expansions, including maintaining project timeline, gathering project requirements, developing project plans and milestones, performing data analysis on incoming client data, and performing post-payment medical claim audits. She participated in and managed projects for a wide range of health plans including Commercial, Medicare Advantage and Medicaid Managed Care Organizations. As part of new client implementations, Danielle participated in payment integrity claim audits for multiple lines of business including, Commercial plans, Medicare Advantage plans, and State Medicaid Agencies including New York, Texas, Illinois, and New Mexico. The medical audits included review of the following: fee schedule rate adherence review, state-specific policy review, duplicate claim submissions, processing errors, coding and billing standards, and coordination of benefits. For fee schedule rate adherence review, Danielle would perform analysis of claim payments against the contracted rates to confirm claims were paid appropriately and follow the payment schedule. If any issues were identified, she would work with the health plan or MCO to rectify the issues. For state-specific policy review, Danielle would review and interpret a state policy and then analyze claims data to ensure claims were paid and processed per policy requirements. If any discrepancies were identified, she would work with the State subject matter expert, the health plan, or the MCO to confirm that her interpretation of the policy is correct and review the claims that were not in compliance with the policy. For processing errors and coding / billing standards, Danielle would utilize data analytics to identify claims that appear to be processed incorrectly (incorrect units, incorrect length of stay, incorrect provider identifier used, etc.) and/or had improper coding / billing codes (Outpatient claims that had incorrect revenue code / CPT code combinations causing higher payment, assistant surgeon / co surgeon claims with incorrect modifiers / payment, etc.) Any claims that were identified as potential outliers would have a thorough audit performed to confirm if issues are present and understand the scope of the issue. She developed queries to analyze client data to help ensure the data met



product needs, maintained all Jira® features/stories, and coordinated priority with the Retrospective Business. She participated in all program increment planning activities in an Agile team environment, coordinated internal resources for weekly checkpoints to help ensure timely completion of project tasks, and developed standardized data analysis tools for the implementation team to perform data analysis and validation. Danielle also identified opportunities to streamline the implementation process and build standard client toolset, mentored Implementation Analysts on their assigned projects, and liaised for the implementation team with Research & Development, Operations, Data Management, Go-to-Market, and Product.

RxAnte (09/2015 – 09/2016)

Danielle worked as a Senior Software Developer to design and develop reusable SAS and SQL code to standardize and analyze clinical information. She supported the Web Services team on development of front-end portal used by healthcare entities to achieve medication adherence, completed software development tasks, including analysis, design, implementation, documentation, and validation, and collaborated with business partners to define business requirements and specifications. Danielle provided information and support for ad hoc analytic projects for internal customers. She also performed data extractions from multiple claims data warehouse to meet project requirements.

Cotiviti/Connolly/iHealth Technologies (01/2012 – 09/2015)

Danielle worked in many roles including Associate Business Systems Analyst, Business Systems Analyst, Auditor, and eventually Senior Auditor to identify claim outliers and overpayments utilizing a variety of Cotiviti tools including trend analysis and outpatient and inpatient pricing. She developed new and existing audit concepts, gained client acceptance, trained all audit levels to execute audit projects and performed quality review of claim submissions. Danielle was responsible for reviewing eligible claims to help ensure they were selected as intended for the specific concept and worked with assigned Data Analysts to enhance or create reports to aid in overpayment identification. She also served as Subject Matter Expert on internal tools and systems, mentored junior associates on Cotiviti tools and best practices, and provided day-to-day support to audit team members on query writing and concept development. She utilized understanding of SQL programming and data structure to identify and implement improvement opportunities in current processes and concepts. Danielle collaborated with business partners to understand how medical claim information should be reported and displayed in Access for day-to-day audit use. She participated in Design Sessions and Code Reviews, built, and supported custom software solutions and analytics tools using Microsoft SQL Server, Access, and Excel while providing team and cross-departmental training(s) on new Cotiviti tools or processes.



Health Dialog (02/2007 – 01/2012)

Danielle worked as a Senior Implementation Team Leader, Senior SAS Programmer Analyst, and SAS Programmer Analyst to develop reusable SAS software to in-take, standardize, quality control, and analyze clinical information such as facility, professional, pharmacy, provider, and health survey insurance data. She advanced, documented, and communicated concepts, utilities, processes, standards, and procedures, while providing and implementing strategic ideas for improvement. Danielle worked alongside management to delegate tasks to team members, provided day-to-day support for programmers, and completed software development tasks, including analysis, design, implementation, documentation, and validation. She facilitated code reviews for code development, standardization, efficiency, and accuracy. Danielle was an active contributor to the hiring, coaching, goal setting and performance reviews of new employees, while working with existing team members to mature their software development skills, and business intelligence.



Lars Loren, JD

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Manager
Years of Experience Relevant to Proposed Role:	22 years
Certifications and Education:	Juris Doctor, Stanford University Bachelor of Arts in Physics, Dartmouth College

Overview

Lars is a member of BerryDunn's Health Analytics Practice Group and former leader of its Data Management Practice, contributing to diverse projects, many of which involve health insurance claim data for commercial and Medicaid populations. These projects include data quality control and analysis of All Payer Claims Databases (APCDs) for state government clients, as well as architecture, development, and analysis of data warehouses and analysis systems for state Medicaid programs, provider-sponsored ACOs, and nonprofit insurers including Medicaid Managed Care Organizations (MCOs). He has a wide breadth of experience in process analysis and reporting and decision support systems. He has participated in all aspects of this work, from hands-on analysis and design to consultation with senior managers on system selection and organizational development.

Experience

BerryDunn (06/2003 – present)

As former director of analytics at BerryDunn and the firm it acquired, Compass Health Analytics, Lars analyzes MCO operational and financial planning business processes and consults with MCOs and state Medicaid entities on decision support organization, strategy, architecture, and data design. His experience includes:

- More than 18 years working with Medicaid enterprise data structure and content, often when consulting with Medicaid MCOs, and always accounting for state Medicaid data sources and rules in system architecture and design
- Providing project management and supporting analysis for procurement of claim processing systems for Medicaid MCOs
- More than four years assisting with decision support system architecture and data design through cross-bureau meetings with Bureau for Medical Services, Bureau for Behavioral Health, and Bureau for Social Services related to child welfare initiatives in West Virginia
- Managing a broad range of general research and analytical projects and providing analytical input, such as analysis of legislative intent and the impact of mandated insurance coverage on premiums

ISDM, Inc. (12/1997 – 06/2003)



As a consultant in a small firm with a national practice focused on marketing and CRM systems, IT planning, and process improvement, Lars worked across various projects as an analyst, project manager, and systems and data architect. Among other projects, he managed a project to implement CRM software for a mid-sized investment banking firm and evaluated and recommended changes in a demand forecasting process.

Other Experience

For Advanta Corporation, Lars served as an internal consultant managing project planning and justification to redesign the customer acquisition database and process.

As part of the Maine Legislative Finance Office and the legislative committee staff that reviewed state programs for usefulness, efficiency, and compliance with law, Lars reviewed healthcare profession regulatory agencies and others, facilitated the deliberations of legislative committees, and drafted legislation.



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 the area of 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 is able to 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 WV 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 PMO and focus on gaining adoption within the organization. Beginning in March 2020, the EPMO project began identifying projects across WV 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 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 WV 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.

WV Department of Health and Human Services, Office of Management Information Services (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

WV 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 subcommittee
- 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.



Annie Messinger, BA, PMP®, CCP, LSSGB

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	17 years
Certifications and Education:	Bachelor of Arts in Media Studies, University of Southern Maine Prosci® Certified Change Management Practitioner (CCP) Project Management Institute (PMI) Certified Project Management Professional® (PMP®) Lean Six Sigma Green Belt (LSSGB)

Overview

Annie is a resourceful and strategic project manager with nearly two decades' experience in resource development and system reform in solutions-driven environments, along with a long history of stakeholder acquisitions and stewardship. She has extensive experience in relationship management with clients, donors, volunteers, staff and community and corporate partners, while using a wide range of resources and best practices to help organizations grow, thrive, and support their future vision and goals.

Experience

BerryDunn (10/2018 – present)

Annie works within BerryDunn's State Government Practice Group, supporting state-level agencies with project management and analysis.

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

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

- *Child Welfare Initiatives Project (05/2019 – present)*

Annie is a strategic project lead in assisting West Virginia with implementing its memorandum of understanding (MOU) with the U.S. Department of Justice (DOJ), now in the fourth of five years. Annie provides project management and support services to the Bureau for Behavioral Health, Bureau for Medical Services and Bureau for Social Services within DoHS to implement its five-year plan to improve the continuum of care for children and families, pursuant to DoHS's agreement with the DOJ. Annie's project management experience supports all three bureaus in timely completion of critical tasks to help ensure DoHS remains compliant to the DOJ agreement and redesigns its child welfare system in a sustainable way.

- *Safe at Home WV (SAH) Redesign, Implementation, Revenue Maximization, and Monitoring (10/2019 – 10/2022)*

Annie's experience with project management currently supports DoHS's Bureau for



Children and Families (BCF) fiscal redesign of the SAH wraparound program for children and families, as the federal funding waiver ended October 1, 2019, pursuant to the federal Family First Prevention Services Act (FFPSA). Annie manages and facilitates several stakeholder workgroups and helps update and maintain State documents in order for the BCF to remain transparent with significant programmatic revisions. Annie's assistance with State documentation updates helped the State successfully reorganize SAH, including areas such as eligibility, enrollment, and data systems, from a \$30M to a \$13M program, and helped ensure all 10 signed provider contracts were received by the deadline. Annie helps the State monitor and assess the program on an ongoing basis.

- *Child Welfare Family First Assessment (10/2018 to 06/2019)*

Annie assisted in the development and analysis of a state assessment of child welfare systems impacted by the FFPSA and the management of sub-projects to help WV's implementation of recommendations resulting from the assessment.

WV Bureau for Medical Services (BMS)

- *Payment Error Rate Measurement (PERM) Project (10/2018 – 10/2019).*

Annie supported the PERM project, including validating errors, research error remedies, and providing oversight for resolution of PERM errors cited for the State.

WV Bureau for Public Health (BPH)

- *Public Health Accreditation Preparation Project (12/2018 – 06/2019)*

Annie provided BPH with project management activities, in her business analyst role, by supporting a gap analysis to determine BPH's readiness to begin the Public Health Accreditation Board (PHAB) accreditation process. Annie assisted by creating promotional messages and facilitating informational webinars, on behalf of the BPH Commissioner, to disseminate to hundreds of staff regarding the PHAB process. Annie also updated reports and a progress tracker to inform BPH on a regular basis.

- **Kentucky Department for Aging and Independent Living (DAIL)**

- *Consulting Services for a Statewide Needs Assessment and State Plan (01/2024 to present)*

Annie is serving as a business analyst and facilitating peer state discussions; analyzing information and assessing results; and making recommendations that can be used to support the development of a State Plan on Aging—in alignment with DAIL leaders' vision and goals for the future of aging and independent living services in the Commonwealth of Kentucky.

- **North Dakota Department of Health and Human Services (DHHS)**

- *Workforce Training Assessment (08/2023 – 01/2024)*

Annie was Project Manager and utilized her PMP® skills for leading the development of an assessment of the state's home- and community-based services (HCBS) workforce training systems. Annie was a servant leader of a team of subject matter experts (SMEs) that was key to assessing the workforce training.



She upheld the project scope and schedule, organized, and facilitated stakeholder listening sessions, and prioritized the client relationship and communication that culminated with a comprehensive assessment for DHHS' workforce and training systems.

The Maine Girls' Academy (01/2018 – 07/2018)

As director of advancement, Annie worked with executive committee to identify, cultivate, and acquire 10 new major donors of \$5,000 or more (unrelated to student body). She increased board governance by building matrix of needs to help diversify the skills and representation on the board, and by recruiting new, talented members. She grew alumnae support to annual fund by securing \$10,000 challenge gift to match any new and increased giving and recruited new team of alumnae to solicit classmates to donate. Annie created advancement systems and strategies to finish out the fiscal year, including analyzing alumnae, parent and grandparent giving trends, and researching donor pools of organizations with like-minded missions. Annie engaged new volunteer group of energetic parents for successful spring auction while minimizing expenses and increasing income.

Wayfinder Schools (03/2017 – 01/2018)

As director of philanthropy, Annie engaged long-standing donors to help lead \$225,000 annual fund and Corporate Giving. She created and implemented new resource development plan, strategies and systems with all new executive team of seven. She grew board governance to a functional capacity for resource development. She hired and supervised development assistant and various development initiatives. Additionally, Annie implemented school-wide employee giving

Boys and Girls Clubs of Southern Maine (09/2006 – 03/2017)

Annie has served in two main roles for this organization:

- **Director of Development and Marketing**

Annie executed \$3 million capacity campaign to augment five-year budget forecast, with dynamic campaign committee and more than 140 donors over three years. She supervised and reviewed Development Coordinator, part-time Grants Coordinator and Administrative Assistant. She worked daily with 38 board trustees of all personalities, industries, and work styles, to accomplish mission and strategic goals. She managed six annual fundraising events including a historical spring auction that grossed over six figures, and two in partnership with large community partner. She worked with the following trustee-led committees: Executive, Capacity Campaign, Steering, Strategic Planning, Resource Development, Investments, Finance, Marketing, Human Resources, Program, State Alliance, and seasonal events. She collaborated with board and adjunct committee members on five-year strategic plan – implemented and actively worked to execute strategic plan. She implemented quarterly scoreboard measurements of marketing initiatives, ranging from event guests and volunteers to long-term donors. She was responsible for fundraising database management and reporting, requiring extensive manipulation of information from Raiser's Edge software. She cultivated, secured, and stewarded major gifts, collaborated with planned giving advisors and



donors to grow \$10 million endowment, and institutionalized annual resource development goals.

- **Development Director**

Annie raised \$275,000 Centennial Fund over and above annual goals to help celebrate Centennial and cover three-year budget gap in preparation of next strategic plan. She led the annual fund, foundations and grants, four special events and worked with 30 board trustees to meet and exceed fundraising goals. Additionally, she managed as many as 100 volunteers over the course of a year.



Arisara Miller, MS

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Manager
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	<p>Master of Science in Economics, Oklahoma State University</p> <p>Bachelor of Science in Business Administration – Economics (Quantitative Statistics Studies), Oklahoma State University</p>

Overview

Arisara is an experienced healthcare data analyst with over two decades of experience collaborating with healthcare institutions and insurance agencies. Her expertise spans claim-based algorithms for quality-improvement and cost-saving programs, data management, and data visualization.

Experience

BerryDunn (06/2018 – present)

Arisara serves as part of BerryDunn's Health Analytics Practice Area as a manager, focusing on data analytics engagements with healthcare clients across the country. She conducts quantitative research and assists on various projects to estimate market impacts of potential health system mergers, health policy changes, and state legislatures' health insurance benefit mandates. She builds SAS-based production processes to clean and validate claims and enrollment data, updates data warehouses, and generates reports of financial performance and health care quality indicators for accountable care organization (ACO) clients.

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

WV Department of Human Services (DoHS)

- *Child Welfare Initiatives Project (11/2020 – present)*

Arisara conducts quantitative research and assists on cross-bureau projects with the Bureau for Behavioral Health, Bureau for Medical Services (BMS), and Bureau for Social Services teams. As the lead healthcare economist and visualization designer/creator for the WV DoHS child welfare system initiatives, Arisara meets regularly with all three DoHS bureaus in developing metrics and reports in interactive dashboards and flexible on-demand reporting tools.

WV Bureau for Medical Services (BMS)

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

Arisara conducts deep-dive analyses on data quality discrepancies and usability issues across the State's MMIS system and data warehouse pipelines. She



interacts with BMS and BMS vendors to share/present findings and assists in data quality resolution recommendations.

Blue Shield of California (11/2011 – 05/2018)

- **Medical Informaticist - Medical Management Analytics (05/2017 – 05/2018)**
Arisara designed and continually improved Tableau dashboards to track cost of healthcare savings from initiatives such as ClaimXten clinical editing, spine surgery / pain management, and radiology pre-service authorization programs. She performed medical and payment policy analyses to inform the Medical Policy Impact Committee, enable new decisions, and evaluate ongoing practices. Other duties included documenting business requirements and designing data models to store post-service clinical review records in the new enterprise data warehouse infrastructure and serving as the team's Tableau Ambassador to establish and encourage best practice standards for server publishing, efficiency, and data visualization.
- **Medical Informaticist - Medical Operations Analytics (11/2011 – 01/2014)**
Arisara built and enhanced analysis methods, data systems, and web-based reporting tools. As a medical informaticist, she critically reviewed existing processes to identify inefficiencies and potential problems, took actions to explore and implement solutions, and directly supported the Chief Health Officer, Vice Presidents, and Directors to achieve corporate goals. She set-up an automated interface to deliver daily data feeds from internal data marts to the case management system vendor to enhance member-level case management, and established and maintained a robust model to calculate savings from pre-service review activities and medical policies, which revealed significant cost reduction opportunities.

BMC Health System, formerly BMC HealthNet Plan (07/2007 – 05/2017)

- **Medical Economics Principal (01/2014 – 05/2017)**
Arisara led the development of numerous complex and time-sensitive analyses to support the CFO, Chief Actuary, and Vice Presidents. She analyzed data to support Medicaid payment method re-pricing, primary care physician attribution, and ACO contract strategy. Other tasks included fulfilling state reporting requirements for total medical expense and relative pricing, developing the quarterly medical expense dashboard, collaborating with IT to help ensure data integrity and resolve issues, and guiding junior and senior analysts on SAS/SQL coding, enterprise reporting definitions, and best practices.
- **Senior Medical Economics Analyst (07/2007 – 11/2011)**
Arisara tracked medical care expenses and utilization trends to inform senior management and influence key decisions on budgeting and pricing projections. She created reporting packages to satisfy the needs of internal and external customers, conducted research with Medical Directors to build methodologies for identifying at-risk patients for telephonic outreach programs as mandated by state authority and corporate goals, prepared and presented ad hoc analyses to support key corporate initiatives to improve care quality and reduce cost, and coordinated with IT to validate data quality and make recommendations on process and system improvements. Arisara was also



responsible for writing project plans, business requirements, technical specifications, and analytic definitions, and for coaching staff on healthcare data, data warehouse structures, and the analytic tool being used.

Harvard Pilgrim Health Care (06/2004 – 07/2007)

As medical economics analyst, Arisara designed and developed claim-based algorithms to pinpoint patients for internal disease management programs such as Oncology, End-Stage Renal Disease, High-Risk Pregnancy, and Cardiac. In addition, she was responsible for building and maintaining related registry records. She worked in partnership with Medical Management and Actuarial to develop the appropriate approach to calculating the return on investment for disease management programs, produced and summarized the key findings of ad hoc strategic financial and budget projection reports, evaluated historical statistics and administrative information to pinpoint recent and prospective budgeting and pricing trend drivers, planned and implemented user acceptance testing procedures and SAS programming templates to validate the integrity of the new enterprise data warehouse and web-based reporting tools, documented and automated data mining and reporting processes to achieve consistency and efficiency, and provided SAS and general analytical training to other analysts.

BlueCross BlueShield of Massachusetts (05/2002 – 06/2004)

- **Finance Development Program for Audit and Controls (01/2004 – 06/2004)**
Arisara completed operational and IT readiness assessments of new product development initiatives. She performed ad hoc data extractions and analyses to support internal and external audit services, and assisted the legal department to help ensure that appropriate confidentiality agreements are in place before releasing any HIPAA-protected health information to external parties.
- **Analyst (05/2002 – 01/2004)**
Arisara evaluated the financial and clinical effectiveness of Cardiac and Diabetes disease management programs. She oversaw data compilations and rate calculations for several NCQA HEDIS measures, co-wrote annual population-based analysis publications to present the top 20 medical conditions affecting insured populations, and studied and compiled claim and medical chart review data to secure the annual supplemental Medicare + Choice payments for the heart failure patient population.

CommunityCare of Oklahoma (05/2000 – 05/2002)

As an analyst, Arisara extracted and analyzed healthcare data to satisfy the needs of internal and external customers. She constructed, updated, and maintained databases for various uses, such as NCQA HEDIS rate calculations, the pharmacy data warehouse, and the dental claims database. She also maintained reference tables to enable consistent and accurate reporting capabilities.



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 BerryDunn's MPG. 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 has the opportunity to 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 DDI 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 HCBS 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 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, healthcare integration services, and structured family caregiving to enhance HCBS 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, healthcare 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 sexually transmitted diseases (STDs), 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.



Andrea Richardson

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Manager
Years of Experience Relevant to Proposed Role:	24 years
Certifications and Education:	Bachelor of Science in Family Studies, University of Connecticut

Overview

Andrea is an experienced consultant with history of working with non-profits. She has experience designing organizational tools and training programs for large human service agencies; creating policy and procedures for multiple programs; and Technology Development as it relates to Human Services. Since 2003, Andrea has effectively managed Medicaid funded programs for children and adults through the Pennsylvania Department of Human Services Home and Community-Based Programs, Autism Services, Intellectual Disability Services, and Child Welfare Services. She utilizes the principles of Organizational Effectiveness (OE) in work with agencies and organizations to help them improve practice, organizational function, and strategize change management.

Experience

BerryDunn (05/2022 – present)

Andrea works as a Senior Consultant for BerryDunn's State Government Practice Group (SGPG) focused on Health and Human Services. She provides subject matter expertise on projects focused on improving child welfare outcomes through systems design. She collaborates across the firm to help others understand the practitioner point of view and provides guidance on state policy. She facilitates discovery sessions for needs assessments focused on child welfare system improvements.

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

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

- *Child Welfare Initiatives (CWI) Program Management (07/2022 – present)*

Andrea provides project support services to assist DoHS with implementing its five-year plan to improve the continuum of care for children and families, pursuant to the department's agreement with the Department of Justice (DOJ). Andrea supports the Children's Mobile Crisis Response and Stabilization (CMCRS) initiative, providing guidance to help ensure policy is updated and aligns with the Bureau for Medical Services (BMS) state plan approved mobile crisis, and pursuant to recommendations presented by the project's independent subject matter expert.



WV Bureau of Social Services (BSS)

- *Foster Care Reduction Project Design (09/2022 – 12/2022)*
Andrea served as a Senior Child Welfare consultant to assist BSS with designing a prospective solution that would help transform the way the agency engages children, youth, and families to build community support for more prevention services and reframe how the agency team views the use of foster care and congregate care use. The plan was used as a driver for system change and complimented national resources provided through Casey Family Programs.

- **North Dakota Department of Health and Human Services (DHHS)
Developmental Disabilities Services**

- *Consulting Services for a Workforce Development Needs Assessment (8/2023 – 2/2024)*
Andrea served as engagement manager on this project to assess the training needs of the DHHS, Developmental Disabilities Section, through discovery sessions with interested parties, performing research on best practices and policy review, making recommendations, and developing needs assessment findings that DHHS could use in their system improvement efforts. Andrea met with the DDS team every week to discuss the findings from the assessment activities and implications to existing and future services in the IDD area.

- **Nebraska DHHS**

- *Consulting Services for a Needs Assessment for Afghan Refugee School Impact (RSI) (03/2023 – 2/2024)*
Andrea served as engagement manager on this project, engaging interested parties, performing research, making recommendations, and developing a needs assessment that focuses on improving the academic performance and successful integration of eligible Afghan refugee children and youth through facilitating education access in public schools.

- **Alaska Department of Family and Community Services (DFCS)**

- *Office of Children's Services Comprehensive Child Welfare Information System (CCWIS) Planning and Procurement (04/2022 – 2/2024)*
Andrea served as principal as a senior business analyst on this project, which included performing a needs assessment to understand the strengths and challenges related to Office of Children's Services (OCS)' existing IT system and associated business processes and Department of Health and Social Services (DHSS)' vision and goals for the future, engaging with interested parties internal and external to OCS (including community partners, providers, and Tribal Nations), performing redesign of core business processes, making recommendations to help OCS achieve its vision and goals, performing and alternatives analysis and cost benefit analysis, and providing support to OCS with the procurement



of the new CCWIS.

KEPRO (11/2021 – 05/2022)

Andrea worked as an Assessor to conduct Supports Intensity Scale (SIS) Assessments for people seeking services through the Office of Developmental Programs. She identified and determined the level of needs based on meeting feedback in conjunction with an assessment tool, facilitated meetings with families and people with varied abilities to help ensure that the correct ratings were reported, and reported on assessment results and findings.

INFO-MATRIX (03/2017 – 05/2022)

Andrea served as a Human Services Consultant to do the pre-sales capture planning for Human Services and other vertical areas. She acted as liaison with county Children and Youth Agencies on case management system needs, policy clarifications, practice improvement, and customer relations. Andrea developed focus group opportunities to better understand County Practice needs and designed high-level requirements that could influence practice proactively. Andrea attended statewide administrator meetings to discuss policy changes in child welfare and identify how they would affect the case management system locally and statewide.

University of Pittsburgh, School of Social Work, Pennsylvania Child Welfare Training Program (CWRC) (10/2008 – 02/2017)

Andrea worked as a Practice Improvement Specialist as well as the Project Manager for the Administration for Children and Families (ACF) Systems of Care (SOC) demonstration grant across the commonwealth in the form of technical assistance, local and federal reporting, and coordination of networking opportunities for child welfare programs. She also served as Project Manager for the statewide Family Center, Promoting Responsible Fatherhood, and Time Limited Reunification Grants federally funded through Community Based Child Abuse Prevention and IV-B dollars. She facilitated statewide and local workgroups comprised of HHS system partners (e.g., Department of Human Services, including the state Medicaid agency, Office of Mental Health and Substance Abuse Services (OMHSAS), and Office of Children, Youth, and Families (OCYF) to develop integrated support plans and services for families and to improve the delivery of state and local Medicaid and other federally funded programs. Andrea provided consultation regarding current policies and statewide legislation to counties and regional Office of Children, Youth, and Families offices to assess and provide technical assistance to counties to assist in the improvement of child welfare practice outcomes specifically around family engagement, system integration and system reform.

PA Department of Human Services (08/2006 – 10/2008)

Andrea served as the SOC Project Manager to monitor the specific deliverables established through the ACF Improving Child Welfare Outcomes through SOC, emerging issues needing resolution in conjunction with the Office of Children Youth and Families (OCYF), Office of Mental Health and Substance Abuse Services (OMHSAS), Department of Human Services (DHS), and ACF. She analyzed and wrote federal semi-annual reports as required by ACF related to the SOC demonstration grant, managed the five-year 2-million-dollar fiscal plan, and supported OCYF and OMHSAS in all phases of the local and national evaluation including tool design, outcome and measurement determination and analysis. Andrea met with state HHS agency partners on a weekly basis to coordinate, review, and improve the integration of



services across the Commonwealth through the creation and implementation of the Integrated Children's Services Plan (ICSP). The ICSP involved the child service systems noted above.

Pennsylvania Counseling Services (10/2005 – 08/2006)

Andrea served as a Behavioral Health and Recovery Services (BHRS) Administrator in charge of Behavioral Health and Rehabilitation Services program for children in the Dauphin County Area. She supervised Behavioral Specialist Consultants, Mobile Therapist, Therapeutic Support Staff, and Administrative Staff. Andrea also designed and implemented clinical programs for people supported and monitored the quality of services within the licensing guidelines.

Keystone Service Systems (08/2003 – 09/2005)

Andrea served as Regional Director to manage residential and home-based programs for children and adults with autism spectrum disorders and developmental disabilities in the Southeast Pennsylvania region. She managed a large non-profit budget of over \$3 million dollars, designed, implemented clinical programs for people supported, and monitored the quality of services within licensing guidelines and agency mission.

Other roles include:

- **ICPromise (03/2017 – 05/2022)** – Founder and President
- **Minerva Educational Consultants (08/2001 – 08/2006)** – President, Educational Advocate
- **Family Autism Center (10/2001 – 04/2003)** – Director
- **Beacon Services, Inc. (12/1997 – 10/2001)** – Lead Educator for Home-Based Services
- **Walnut Street Center (08/1996 – 12/1997)** – Program Coordinator for Day Programs
- **The May Institute for Adult Services (12/1995 – 11/1997)** – Employment and Training Specialist and Program Coordinator for Residential Home
- **The Walker Home and School (01/1995 – 12/1995)** – Child Care Worker



Michelle Weaver

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Subject Matter Expert
Years of Experience Relevant to Proposed Role:	26 years
Certifications and Education:	Bachelor of Science in Chemical Engineering, Virginia Polytechnic Institute and State University Achieve Global – Leadership for Results Trainer Certification

Overview

Michelle is a data-driven executive level leader with over 20 years of experience in operations of private sector community-based services for adults and children with intellectual and developmental disabilities and complex mental health issues. Michelle has significant ground-up experience and operational insight, as well as detailed working knowledge of other functions within organizations including human resources, finance, information technology, clinical, quality, and compliance. She possesses in-depth understanding of the regulatory and funding environment in the intellectual disability (ID)/developmental disability (DD) service industry, as well as expertise in a diverse array of services including residential (supported living, ICF/ID, licensed homes, and specialized residential facilities), autism/behavioral, day programs, and supported employment.

Experience

BerryDunn (04/2021 – present)

Michelle is a consultant utilizing her subject matter expertise to support the State of West Virginia (WV) and its Child Welfare projects and initiatives.

- **State of WV**

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

- *Child Welfare Initiatives (CWI) Project (04/2021 – present)*

As a SME, Michelle supports the Bureau for Medical Services, Bureau for Behavioral Health, and Bureau for Social Services in establishing its quality assurance and performance improvement programs, systems, and infrastructure, including the development and implementation of DoHS's continuous quality improvement plan, key performance indicators, data collection and reporting, recurring quality committee reviews, and rapid cycle improvement activities. Additionally, Michelle continues to meet regularly with all three bureaus to assist in the establishment of systems for aggregating data for completion of cross-systems analysis to evaluate accessibility, availability, and outcomes of services for children and families in the children's mental health services system. Michelle participates



in regular review of policy and process changes with all three bureaus to ensure integration of data, reporting, and quality processes.

Opt2Inspire LLC (08/2019 – present)

As managing director, Michelle provides consultation and project management services to business and state agencies in the ID/DD and child welfare services sector. In this role, she has significant experience in the development of continuous quality improvement plans and processes, including establishment of recurring data collection, analysis, and reporting of performance measures and outcomes to evaluate process/systems efficiency, quality of services, provider capacity, and outcomes for individuals and families. She provides consultation on service design for individuals with complex needs. Additionally, Michelle supports firms in the diligence review of providers in the ID/DD and child welfare service space.

Embassy Management LLC and SL Start & Associates (09/1998 – 05/2019)

In her 21 years with SL Start & Associates and Embassy Management LLC (SL Start was acquired by Embassy Management in 2011), Michelle held a variety of positions, including the following:

- *Chief Operating Officer (COO) (04/2014 – 05/2019)*
As COO, Michelle provided oversight for day-to-day operations of six subsidiary operating companies providing supported-living, residential habilitation, licensed homes, employment services, day treatment, and behavioral and therapeutic supports in several states. In this role, she managed \$160 million in annual revenue, with approximately 3,400 employees. Additionally, she oversaw program operations; managed development of new services and integration of acquisitions; and maintained relationships with state human service and Medicaid agencies, counties, and other customers and community partners, including negotiation of reimbursement rates and regulatory changes.
- *Chief Development Officer (08/2012 – 04/2014)*
As Chief Development Officer, Michelle developed proposals and project plans in response to Requests for Proposals/Qualifications; provided support to operations teams in startup and other organic growth efforts; and oversaw mergers and acquisitions.
- *Vice President of Developmental Disabilities Agency Operations (09/2006 – 08/2012)*
In this role, Michelle oversaw and directed division operations providing developmental therapy and behavior intervention services to children and adults with disabilities in multiple locations across Idaho and Washington. She developed and maintained policies and procedures to ensure compliance with state and federal regulations, as well as alignment with organizational objectives. Additionally, she ensured division-wide communication and training on policy and regulatory changes and updates; oversaw and assisted with preparation for internal and external quality assurance, licensing, and certification audits; and participated in the state-wide provider association, including serving a two-year term as president.
- *Vice President (VP) of Business Systems (02/2005 – 09/2006)*
As VP of Business Systems, Michelle served as project manager for an initiative to standardize multi-state operations throughout the assisted living division and



developmental disabilities program division. Additionally, she facilitated development and implementation of the Tailored Life® Process for operations, defining the systems, policies and procedures, processes, and training for providing personalized senior resident care and services for individuals with disabilities. In this role, Michelle also facilitated implementation of case management software across five senior living communities in two states.

- *Trainer/Senior Trainer (10/2002 – 02/2005)*

In this role, Michelle established training schedules and facilitated leadership, new hire orientation, and job specific training, both classroom and on the job, for managers and other employees across the company.

- *Branch Manager (11/2000 – 10/2002)*

As branch manager, Michelle provided oversight of residential habilitation services in ten community-based homes for adults with developmental disabilities.

Eastman Chemical Company (08/1991 – 06/1998)

As project manager and process improvement engineer, Michelle planned and executed multiple projects to improve product quality, increase yields, increase production rates, and improve process safety at a chemical production facility. Additionally, she provided technical assistance in the startup of a new production facility in Mexico, which included living and working in Mexico for three months.



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

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Manager
Years of Experience Relevant to Proposed Role:	16 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</p> <p>Certified Outpatient Coder, American Academy of Professional Coders</p> <p>Lean Six Sigma Green Belt (LSSGB) Certification</p>

Overview

Dawn is a manager in BerryDunn's MPG, providing leadership and project management to WV's Medicaid Information Management System (MMIS) and policy unit projects. She has over 25 years of experience in medical claims processing and revenue cycle management, including over eight 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, WV.

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

WV BMS

- *Quality Improvement Initiatives Portfolio Management (05/2019 – present)*
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, Payment Error Rate Measurement (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)*



- *DIP (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)*
- *Advanced Planning Document (APD) Assistance (05/2018 – 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.
- *Payment Error Rate Measurement (PERM) Project (05/2018 – present)*
Dawn serves as the project manager for the PERM project, managing budgets and project deliverables and working 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 works closely with the client to evaluate the MMIS fee schedules and claim edits to ensure MMIS setup is in compliance with 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.

- **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.
- **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.

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 healthcare 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.

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 claims examiner.



Fei Zou, MS

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Healthcare Analyst
Years of Experience Relevant to Proposed Role:	12 years
Certifications and Education:	Master of Science in Mathematical Science, University of Massachusetts Lowell Bachelor of Science in Applied Mathematics, Tongji University SAS Certified Advanced Programmer for SAS 9

Overview

Fei is an experienced analyst with more than 10 years' experience in the Healthcare industry, including nine years with Medicaid managed care organizations (MCO). She is proficient in SAS, SQL, and MS Excel and is familiar with medical and pharmacy claims, HEDIS, CMS/NCQA/PQA measures, DRG and Risk Adjustment. She has developed her skills in learning quickly, multitasking, and working both independently and on a team.

Experience

BerryDunn (07/2021 – present)

Fei is a Senior Healthcare Analyst in BerryDunn's Health Analytics Practice Group, supporting various projects with data visualization, analysis, and reporting.

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

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

- *Child Welfare Initiatives Project (07/2021 – present)*

Fei coordinates the data collection efforts from various DoHS Bureau for Medical Services (BMS) and the Bureau for Social Services (BSS) vendors, ensuring timely and accurate delivery of data to support the Office of Quality Assurance for Children's Programs (OQA)'s reporting. She conducts thorough data quality review and analysis to maintain high standards of data accuracy and process reliability, which further guides the data collection workflow changes and requirement specifications. Fei plays a key role in supporting the ingestion and implementation of these systems and program data sources into the comprehensive data store. She is also on the core team to meet regularly with BMS and BSS program teams to support the generation of monthly, quarterly, semi-annual, prototype, and ad-hoc/stop-gap reports, analyses, and visualizations to meet OQA's reporting and Continuous Quality Improvement (CQI) program operation needs.



- Data Improvement Project (07/2021 – present)

Fei supports the data reconciliation efforts during MMIS data warehouse system migration, ensuring accuracy and consistency between legacy and new systems. She is on the core technical team that develops and implements effective strategies and technical solutions to identify data issues, including duplications, unusual trends, and mismatches in information. She collaborates with the State vendors in recommending resolutions to address identified data quality issues.
- **Community Care Behavioral Health (CCBH) (07/2021 – present)**
 - Fei leads the generation of monthly financial reports, which provides the client, a Medicaid behavioral health managed care organization, with comprehensive insights of cost trending and supports the regulatory reporting submission to the State of Pennsylvania's Medicaid agency. She spearheads efforts to streamline the report generation process, identifying inefficiencies and implementing solutions to enhance efficiency and accuracy; conducts ad-hoc trend analysis to identify patterns and anomalies. She executes precise data manipulation for actuarial models, ensuring accuracy and integrity in complex financial calculations.
- **New Hampshire Insurance Department (NHID) (07/2023 – present)**
 - Fei plays a key role in the health cost transparency initiative by managing regular updates to the NH health cost website, ensuring accurate and up-to-date information for consumers. She provides in-depth analysis for healthcare providers, offering insights into cost trends, and comparative benchmarks. She helps implement automation initiatives to streamline the manual reporting processes.

BMC Health System (formerly HealthNet Plan/WellSense) (08/2012 – 07/2021)

Fei worked as a health data analyst II, senior health data analyst, and senior medical economics analyst. She led the development and production of regulatory reports in collaboration with the state Medicaid agencies including Massachusetts Executive Office of Health and Human Services, New Hampshire Department of Health and Human services. She developed and analyzed monthly reports to identify high risk/high utilization Medicaid population for care management. Fei supported strategic planning including risk adjustment and quality improvement initiatives. She created a results-tracking dashboard for utilization trends, quality measure compliance, and care management operations for both internal and external clients. Fei also investigated unusual utilization trends, built, and maintained a profitability database for an Accountable care organization (ACO) model, and worked on the claim service categorization from the design phase to the user acceptance testing (UAT) phase. She was responsible for code migration and impact analysis for the ICD9/ICD10 transition and training for new hires.

Health Dialog (08/2010 – 08/2012)

Fei worked as an evaluation analyst designing code models to estimate clinical outcomes and financial impact. She consulted with internal and external customers for an appropriate analysis



plan and debugged, reviewed, and wrote Standard Operating Procedures for SAS products.



Shandia Benke, ECBA™

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Project Coordinator
Years of Experience Relevant to Proposed Role:	6 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, systems and processes set up and improvement, and Articulate Storyline e-learning course creation. 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) Department of Human Services (DoHS)**
 - *WV Engagement (WVE) PMO Mountain Health Trust (MHT) Phase II Project (2/2024-present)*
 - *WVE PMO People's Access to Help (PATH) Project (05/2023 – present)*
Shandia provides coordination and analytical support to the MHT and PATH projects through capturing detailed notes, editing and reviewing project documentation, and contributing insightful processes and business analysis. Additionally, Shandia focuses on promoting efficiency through identifying gaps in internal processes and taking 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 – 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 – 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.



Grady Black

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	1 year
Certifications and Education:	Bachelor of Science in Data Analytics, Bentley University

Overview

Grady is a member of the BerryDunn HAPG supporting our project staff with data analytics, database management, applied statistics, and programming.

Experience

BerryDunn (05/2022 – present)

As a member of the BerryDunn HAPG, Grady assists the team and clients with business analysis, data quality analysis, and profiling.

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

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

- *DIP (05/2022 – present)*

As part of the WV Data Improvement Project (DIP), Grady has assisted in developing mapping documents, running ad hoc analyses, and developing data profiling reports.

- *Child Welfare Initiative (CWI) (7/2022 – present)*

Grady supported the CWI project by gathering relevant requirements, creating data dictionaries, crafting a data structure for seamless data entry, and generating visuals to describe pertinent trends in CWI data. Grady is currently developing a program that tracks data discrepancies and fluctuations across weekly extract loads, allowing for the database management team to address potential data quality issues and efficiently address client needs and questions.

- **Community Care Behavioral Health (CCBH)**

- *Actuarial Support (10/2023 - present)*

Grady supports BerryDunn's actuarial team by troubleshooting production code and producing data visualization dashboards in Tableau to create dynamic views for relevant data points across CCBH contracts.

- **Town of Falmouth Comprehensive Plan**

- *Local Government Practice Group Support (11/2023 - 12/2023)*

In support of BerryDunn's Local Government Practice Group, Grady assisted in the presentation of survey results via the manipulation of survey data and the collaborative creation of a public, interactive data dashboard.



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. Caitlin is a Poynter ACES Certified Editor.

Experience

BerryDunn (09/2021 – 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.

QualityMetric (08/2020 – 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 – 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 – 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 – 05/2020)

Caitlin worked as an office assistant to streamline faculty responsibilities by completing deliveries, filing documents, and tackling office projects. She monitored departmental computer lab, assisted students, and maintained an environment conducive to productivity. Caitlin also served as a representative for the department at university events.



Janine DiLorenzo

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	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.



- ***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.



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



Carole Ann Guay

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



Megan Hamilton, MA

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 WV 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.



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.



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)**

- **WV 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 USVI 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 Court Appointed Special Advocate (CASA) Program (04/2016 – 04/2021)

Hailey served as a Lake County CASA 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.



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 MES 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 Statements 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) E&E 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 & CHIP 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 and 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 (GSU) (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 GSU 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.



Skye Kwong

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Consultant
Years of Experience Relevant to Proposed Role:	1.5 years
Certifications and Education:	Bachelor of Arts in Economics and Biology, Morrissey College of Arts and Sciences, Boston College

Overview

Skye is an experienced analyst with expertise in legislative policy, data collection and analysis, and program management organization. She has worked previously in emergency housing system organizations and in government agencies to align objectives with data and clearly communicate data to legislators, administrators, and constituents.

Experience

BerryDunn (06/2022 – 08/2022; 07/2023 – present)

As a summer intern, Skye provided project support including research and analysis on Public Health and Child Welfare projects in WV.

As a full-time consultant, Skye provides project support related to research on data/programs in the Public Health Practice and Child Welfare projects in WV.

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

- **WV Bureau for Public Health (BPH)**

- *Accreditation Readiness (08/2023 - present)*

- Skye supports the Accreditation Readiness project with data analysis and research for the State Health Assessment and Data Modernization initiative.

- **North Dakota Department of Health and Human Services**

- *Workforce Training Assessment (10/2023 – present)*

- Skye supports the Workforce Training Assessment project with research, project coordination, and data collection.

U.S. Government Accountability Office (GAO) (09/2021 – 05/2022)

Skye worked as an Analyst Intern to assist in planning and conducting in-depth reviews of executive and legislative branches. She conducted federal audits and program evaluations to provide objective and reliable analysis to Congress and other federal agencies, produced and researched policy recommendations and improvements on a variety of government issues, and collected relevant information, both qualitative and quantitative data, aligned with objectives of the mission teams. Skye analyzed data that yielded quality information and identified relevant patterns, inconsistencies, and potential implications. She prepared quality written work with complete evidence to communicate relevant and accurate information to appropriate audiences



and communicated quantitative and qualitative findings during formal presentations, meetings, and interviews.

Homes for Families (06/2021 – 08/2021)

Skye worked as a Policy Intern to analyze quantitative and qualitative data on racial equity in the emergency housing system. She supported data maintenance and updates to Homes for Families (HFF) tracking and communications systems, researched housing, homelessness, and economic development, and presented data to other organizations. She authored/co-authored multiple blog posts and briefs on legislative bills such as the Right to Counsel and the Right of First Refusal Act and prepared meeting agendas and reports for HFF meetings with senators and representatives. She drafted and edited member, advocacy, and event materials, produced/edited policy briefs, graphs, and other information for policy makers and constituents, and assisted with the planning and execution of events and other communication efforts.

County Legislator Joshua Lafazan (06/2017 – 11/2017)

Skye worked as a Policy Intern to plan and produce legislative proposals regarding housing, education, and environmental issues. She developed and implemented various fundraising strategies to improve efficiency and scale of donations, organized events and speaking engagements to promote communication between the candidate and voters and provided important feedback from community members to the candidate about necessary issues that have yet to be addressed.



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:	<p>Master of Business Administration, focus on Healthcare Administration, Marshall University</p> <p>Bachelor of Arts in Communication Studies, focus on Organizational Communication, Marshall University</p> <p>Project Management Institute (PMI) Certified Associate in Project Management (CAPM®) (<i>in progress</i>)</p>

Overview

Katie is a Senior Paraprofessional with extensive knowledge in communication skills including engaging, professional presentations, superior-subordinate communication, intercultural communication, leadership & 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 Multistate 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 Multistate 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 IP (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.



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 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 – present)

Alycia works with the BerryDunn team in West Virginia (WV) 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 – 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 – 8/2021)

- *Senior Editor (6/2020 – 8/2021)*

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



updating the document annually to help ensure proper terminology and appropriate treatment of diversity, equity, and inclusion principles.

- *Editor (4/2017 – 6/2020)*

As an editor Alycia copyedited, proofread, and fact-checked marketing collateral; web copy; press releases; research reports; financial, legal, and technical documents; presentations; social media copy; proposals and requests for proposals; case studies; and meeting notes. She helped to ensure that all materials are well-written, accurate, properly researched, objective, concise, and focused, as well as helping to ensure consistency in voice, brand, and tone across messaging channels.

University of Southern California Graduate School of Social Work (9/2015 – 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 – 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 – 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 – 12/2011)

- *Student Director (8/2010 – 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.

- *Writing Center Tutor (8/2008 – 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.



Dina Nash, MPH

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	7+ years
Certifications and Education:	Master of Public Health in Epidemiology and Biostatistics, Boston University Bachelor of Arts in Psychology, Harvard University

Overview

Dina is an experienced senior consultant who specializes in healthcare data analysis, claims, and clinical data. She has training in conflict communication, delegation, facilitation, and project management and has worked extensively with Statistical Analysis System (SAS) code, Structured Query Language (SQL) Code, Microsoft (MS) Excel, and Tableau. Additionally, Dina is a council member of BerryDunn's Diversity, Equity, and Inclusion Advisory (DEIBA) Council, and a member of the Systemic Barriers to DEIBA Subcommittee.

Experience

BerryDunn (09/2021 – present)

Dina serves as a senior consultant in BerryDunn's Health Analytics Practice Group (HAPG), working with clients on data analysis, claims analysis, and clinical data projects related to social services and Medicaid programs. Dina also works on mandated benefit reviews (estimating the financial impact of pending mandated benefit legislation), and health policy and regulatory analyses.

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

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

- *Child Welfare Initiatives Project (09/2021 – present)*

Dina supports the project management of a team of analysts supporting the DoHS Office of Quality Assurance for Children's Programs (OQA). She consistently organizes core team efforts and maintains regular communication with OQA, Bureau for Medical Services (BMS), Bureau for Behavioral Health (BBH), Bureau for Family Assistance (BFA), Bureaus of Social Services (BSS), and DoHS vendors, helping to ensure alignment with reporting and Continuous Quality Improvement (CQI) program needs. Dina's responsibilities include generating visualizations for monthly, quarterly, semi-annual, prototype, and ad hoc/stop-gap reports to meet OQA's operational requirements. She also regularly reviews team members' work and verifies consistency and accuracy. Dina is also involved in prototyping new actionable and insightful visuals to enhance the clarity and effectiveness of the team's deliverables.



- *Mental Health Parity Project (01/2022 – present)*
Dina provides essential support for writing and research in mental health parity reports. She has also developed interactive and informative dashboards, along with trend charts, to visually present complex data related to mental health parity.
- **Massachusetts Center for Health Information and Analysis**
 - *Data Analyst, Policy Analyst, and Project Manager (09/2021 – present)*
Dina works on mandated benefit reviews (MBRs). For these MBRs, Dina writes SAS code to query the Massachusetts All-Payer Claims Database (APCD), creates diagrams and visuals, and supports medical efficacy research and writing of the report. More recently she led the Biomarker Testing MBR. MBRs include a medical efficacy analysis and an estimate on health insurance costs, typically over five years. MBRs Dina has worked on 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
- **New Hampshire Insurance Department (NHID) (07/2023 – present)**
 - *HealthCost Transparency Initiative*
Dina supports the HealthCost transparency initiative with the creation of interactive Tableau dashboards. She also supports project management, ensuring smooth coordination with the client and associated vendors.
- **Wisconsin Office of the Commissioner of Insurance (03/2022 – 10/2023)**
 - *Wisconsin Individual Health Insurance Market Analysis, Short-Term Limited Duration Plans, and Network Adequacy Reports*
Dina played a crucial role in supporting research, writing, and data analysis for the Wisconsin Individual Health Insurance Market Analysis, Short-Term Limited Duration Plans, and Network Adequacy reports. Her contributions encompassed conducting in-depth research, synthesizing complex data, and crafting insightful analyses. Dina's expertise extended to developing visually engaging and



informative visualizations to facilitate understanding and decision-making in these critical areas of health insurance evaluation.

- **Maine Bureau of Insurance (ME BOI) (03/2022 – present)**

- *Non-Quantitative Treatment Limitations (NQTLs)*

- Dina supports mental health parity by conducting NQTLs comparative analyses. She also supports the creation of mental health parity tools.

Mass General Brigham Enterprise Analytics (06/2018 – 07/2021)

Dina worked as a healthcare data analyst to develop SAS and SQL codes for metrics for a complex care program dashboard used by program and hospital leadership and for the Massachusetts Medicaid agency report submission. The complex care program was comprised of a diverse patient population. Dina conducted analyses on patients with Medicaid, Medicare, and commercial insurance. She also supported the patient centered medical home program with creation of advanced primary care strategy metrics, logic, and visuals, and assisted manager with supporting new analysts. She reviewed code written by other analysts. Dina conducted a Deferred Care Analysis due to COVID-19 epidemic that informed state and system wide decision-making and led to publication in American Journal of Managed Care. This Deferred Care Analysis was stratified by commercial payers, Medicaid, and Medicare, as well as by select social determinant of health variables.

Partners HealthCare Enterprise Analytics (08/2017 – 05/2018)

Dina worked as a program analytics intern covering system level population health program areas.

Partners HealthCare Center for Population Health (06/2017 – 08/2017)

Dina worked as a financial and clinical analytics intern to support the quality team by updating dashboard and exception reports using SAS and MS Excel. She conducted analysis in SAS on Generalized Anxiety Disorder Screening Measure and created pharmaceutical cost trend driver visuals. Dina also collaborated on healthcare services cost equivalency visual in PowerBI.



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 lifecycle (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 timeframe



and documentation needs.

WV 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 timeframes. 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 e-mail 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 and 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/note taking. 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.



Jordan Ramsey, MA, LSSGB

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

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, LSSGB, 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.



Courtney Rombow, CCP

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Project Coordinator
Years of Experience Relevant to Proposed Role:	13 years
Certifications and Education:	Certified Office Manager, National Association of Certified Bookkeepers Diploma in Human Resources, Alison Learning Academy Prosci® Certified Change Management Practitioner (CCP)

Overview

Courtney is an experienced project management professional with more than 10 years' experience supporting various teams, offices, and projects. She has demonstrated skills in organization, planning, and training, with a focus in project management support.

Experience

BerryDunn (01/2022 – present)

Courtney works as a Senior Project Coordinator to assist in preparing presentations, developing and reviewing project deliverables, and conducting research and analysis for various project-related activities and tasks. Courtney supports her projects by providing meeting notes, drafting meeting agendas, managing scheduling, drafting project artifacts and deliverables, and tracking project action items, risks and issues, and adherence to contractual SLAs.

TC Energy (09/2020 – 08/2021)

Courtney worked as a Project Support Analyst to provide administrative support, collect external labor hours and mileage, and act as document controller of tenure construction documents were collected and managed. She compiled weekly and monthly reports, established and maintained the project repository website, and tracked and reported project status, action items, and risks and issues. Courtney also identified opportunities for improvements and documented lessons learned.

American Roofing Products (12/2019 – 08/2020)

Courtney worked as a Client Relations Specialist to assess customer concerns, address issues and discrepancies, and solve problems. She maintained current business as well as identifying new business prospects and opportunities for expansions in the customer base. She liaised between groups and individuals, managed schedule and sales goals, and maintained detailed records. She performed necessary collection activities and created vendor incentive program to boost sales and increase client satisfaction.

BerryDunn (10/2018 – 12/2019)



Courtney worked as a Senior Project Coordinator to assist in preparing presentations, developing and reviewing project deliverables, and conducting research and analysis for various project-related activities and tasks. She facilitated and managed meetings and project-related tracking logs. She acted as proofreader, developed onboarding materials for new hires, and provided orientation and job training. Courtney also maintained staff certifications tracking logs and high priority and confidential information.

RoadSafe Traffic Control (04/2018 – 10/2018)

Courtney worked as a Project Coordinator to coordinate upcoming jobs, handle scheduling and dispatching, and coordinated with municipal departments to obtain the correct permits. She performed public relations duties, administrative tasks, and the management of employee licensure to comply with federal and state regulations.

Maxim Crane Works (03/2011 – 09/2017)

Courtney worked as an office manager to oversee transactions and invoices, supervise the administrative staff, and recruited and trained applicants. She organized company events, created onboarding and training materials, and completed performance evaluations.



Emily Tan

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Staff Consultant
Years of Experience Relevant to Proposed Role:	1 year
Certifications and Education:	Bachelor of Arts in Statistics, Colby College

Overview

Emily is a trained data analyst and statistician. She graduated from Colby College, where she studied statistics. She is a member of the Mu Sigma Rho, the national honorary society for statistics. She had previous internship experience analyzing data and solving business problems with large companies using R, SAS, SQL, and the Agile framework.

Experience

BerryDunn (07/2023 – present)

Emily is a data and business system analyst within BerryDunn's HAPG.

- **Medicaid (and Dual-Eligible) MCOs (07/2023 – present)**
Emily serves as a data and business system analyst to gather requirements, develop analytic and ETL programming in SQL and SAS, and generate reports and visualizations to support a wide range of data and reporting infrastructure build work for the clients' medical cost, VBP, and FWA etc. initiatives.

Western Union (06/2022 – 08/2022)

Emily worked as a UAT Intern to create test cases, assist with documentation, and examine different products for the company. Emily worked with a group of other interns to create a final project, where she analyzed and collected business data.

Pfizer (06/2021 – 08/2021)

Emily worked as a Statistical Programming and Analysis Intern to analyze data and create visualizations for Pfizer's submission data using R. She also worked with the other interns to create a machine learning initiative for the clinical trial process.



Joseph Tumblin, MS

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Senior Healthcare Analytic Programmer
Years of Experience Relevant to Proposed Role:	7 years
Certifications and Education:	Master of Science, Applied Biostatistics, Boston University Bachelor of Arts, Mathematics, College of the Holy Cross

Overview

Joseph is a seasoned programmer with seven years' experience in data analysis, data mining, and data visualizations within a healthcare system and a large pharmaceutical company.

Experience

BerryDunn (11/2023 – present)

Joseph is a senior healthcare analytic programmer with BerryDunn's HAPG. Since joining BerryDunn, he has performed data analysis for MassHealth Continuous Skilled Nursing biennial study.

Pfizer (09/2020 – 11/2023)

As a senior statistical programmer and associate statistical programmer, Joseph took the leading role working with statisticians and medical writers to receive and create outputs for Ad Hoc requests. He worked to produce and Quality Check (QC) a variety of Clinical Data Interchange Standards Consortium (CDISC) standard datasets, as well as tables, listings, and figures and used both Statistical Analysis System (SAS) and tools such as Pinnacle 21 Enterprise and Beaconcure Verify to run QC. Joseph worked in a subgroup to develop additional QC checks performed by Beaconcure Verify QC tool and assisted with FDA submission work, including coordinating Clinical Study Data Reviewer's Guide Package. During his tenure, he worked on a variety of rapid response requests from drug agencies from several countries.

Partners HealthCare System (08/2016 – 06/2020)

Joseph worked as an analyst and research assistant to understand the implications of variations in Nurse Care Manager panel size in a high-risk care management program on care quality. He regularly worked with an enterprise data warehouse containing Medicare (including Medicare-Medicaid dual-eligible population), Medicaid, and commercial administrative claims, electronic health record, and billing data and used SAS to manipulate data and create datasets for researchers at various Partners hospitals. Joseph created and validated measures to help monitor a high-risk care management program and administered several trainings in data visualization using Microsoft Excel.



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 (mwtnewsandviews.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.



Appendix B: Deliverable Dictionary

Table 4: Deliverable Dictionary

Deliverable #	Deliverable Name	Deliverable Description
01	Monthly Briefing	Monthly update with State sponsor
02	Phase V Project Management Plan	Plan for the project
03	Monthly Status Report	Monthly status update
04	Monthly Project Issue and Risk Escalation Report	Monthly update on project risks and issues
05	Monthly Decision Log	Monthly update on decisions that significantly affect the overall project
06	Monthly Project and Workgroup Dashboard	Monthly update on deliverables for project leads
07	Master Project Schedule	Schedule for the project
08	Workgroup Facilitation Materials	Workgroup materials for meetings and actions items or tasks
09	Policy Review and Gap Analysis Recommendations	Recommendations for policy revisions relevant to the project
10	DoHS Policy and Procedures specific to compliance with the DOJ Agreement	Compliance materials related to policy and procedures
11	As-Is Business Process Maps	Business processing mapping services
12	To-Be Business Process Recommendations, Implementation Plan, and Evaluation Strategy	Recommendations as a result of business process mapping
13	Lessons Learned Report, if requested	Lessons learned from previous project phase or as needed throughout current phase
14	Policy and Procedures specific to the SAH program	Recommendations for SAH policy or process revisions relative to the project.
15	Finalize KPIs and associated data collection	Finalized KPIs



Deliverable #	Deliverable Name	Deliverable Description
	per the CQI plan, including vendor data	
16	Plan for oversight, monitoring, and accountability for DoHS staff to follow workflows, policies, and procedures	Leadership oversight planning
17	Plan for oversight, monitoring, and accountability for vendor contracts	Vendor oversight planning
18	QA/PI logical specifications for performance measures per the DOJ Agreement	Quality assurance and performance improvement specifications for DOJ Agreement measures
19	Specifications, implementation, and deployment package for QA/PI data store to support dashboards and CQI reporting, associated data transformation code, and associated documentation for OMIS	Implementation of the QA/PI specifications
20	Dashboards to support programs in the DOJ Agreement	Data dashboards
21	Analytical support for semiannual and CQI reporting	Support for analyzing DOJ reporting
22	Results and documentation of ad hoc data analysis requests	Documentation based on ad hoc requests for data analysis
23	Documentation and training for dashboard users and analysts	User training for data dashboard
24	Sub-Project Management Materials	Materials for sub-projects as needed
25	Project Closeout Summary	Summary of the project once completed



Appendix C: Acronyms/Abbreviations

Table 5: Acronyms/Abbreviations

Acronym/Abbreviation	Definition
APD	Advance Planning Document
BBH	Bureau for Behavioral Health
BCF	Bureau for Children and Families
BHA	Behavioral Health Administration
BMS	Bureau for Medical Services
BPH	Bureau for Public Health
BPI	Business Process Improvement
BSS	Bureau for Social Services
CANS	Child and Adolescent Needs and Strengths
CCBH	Community Care Behavioral Health
CCWIS	Comprehensive Child Welfare Information System
CFSR	Child and Family Services Review
CL	Commodity Lines
CM	Care Management
CMA	Centralized Master Agreement
CMHS	Children's Mental Health Services
CMS	Centers for Medicare & Medicaid Services
CO	Contractor Management
CPA	Child-placing Agency
CQI	Continuous Quality Improvement
C&S	Conditions and Standards
CWI	Child Welfare Initiatives
DDI	Design, development, and implementation
DoHS	Department of Human Services
DOJ	Department of Justice
EDS	Enterprise Data Solution
EM	Engagement Manager
FFP	Federal Financial Participation



Acronym/Abbreviation	Definition
FFPSA	Families First Prevention Services Act
GPM	General Project Manager
HCBS	Home and Community-Based Services
IAPD	Implementation Advance Planning Document
IP	Implementation Plan
IT	Information Technology
KPI	Key performance indicators
LCA	Local Coordinating Agency
LPM	Lead Project Manager
MITA	Medicaid Information Technology Architecture
MMIS	Medicaid Management Information System
MPG	Medicaid Practice Group
O&E	Outreach and Education
OM	Operations Management
OMIS	Office of Management Information Services
PATH	People's Access to Help
PE	Provider Enrollment
PL	Plan Management
PM	Project Management
PMP	Project Management Plan
QA	Quality Assurance
QA/PI	Quality Assurance/Performance Improvement
R3	Reducing the Reliance on Residential
SAH	Safe at Home
SME	Subject Matter Expert
SOW	Scope of Work
SS	Support Staff
TFC	Therapeutic Foster Care
USVI	United States Virgin Islands
WV	West Virginia

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Simple Search

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☐ Any Words ⁱ

☐ All Words ⁱ

☐ Exact Phrase ⁱ

e.g. 123456789, Smith Corp

"berry dunn mcneil & parker llc"

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Entity

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Location

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Status

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BERRY, DUNN, MCNEIL & PARKER, LLC

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

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

Authorized Shares	Young Entrepreneur	Not Specified

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

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

DBA			
DBA Name	Description	Effective Date	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

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Monday, June 3, 2024 — 8:51 AM

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