



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

State of West Virginia Delivery Order

Order Date: 07-03-2024

CORRECT ORDER NUMBER MUST APPEAR
ON ALL PACKAGES, INVOICES, AND
SHIPPING PAPERS. QUESTIONS
CONCERNING THIS ORDER SHOULD BE
DIRECTED TO THE DEPARTMENT
CONTACT.

Order Number:	CDO 0511 2680 BMS2400000061 1	Procurement Folder:	1443215
Document Name:	Organizational Development Project Phase II	Reason for Modification:	
Document Description:	Organizational Development Project Phase II		
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 2025 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:	\$499,640.00
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Purchasing Division's File Copy

CH 7/18/24
PURCHASING DIVISION AUTHORIZATION
DATE: *Tara* 7/18/24
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION
DATE: *7-19-24*
ELECTRONIC SIGNATURE ON FILE

Extended Description:
Organizational Development Project Phase II

Service Period: 07/22/2024-06/14/2025

Total Cost: \$499,640.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$77,400.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2024-07-22	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

360 hours @ \$215.00 = \$77,400.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$32,400.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2024-07-22	2025-06-14				

Commodity Line Description: Engagement Manager: Optional Renewal Year One

Extended Description:
Engagement Manager: Optional Year One

Hourly Rate: \$270.00

120 hours @ \$270.00 = \$32,400.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$118,800.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2024-07-22	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

660 hours @ \$180 = \$118,800.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4*	80101600	0.00000		\$0.0000	\$271,040.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2024-07-22	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

3,388 hours @ \$80 = 271,040.00



June 3, 2024

To Whom It May Concern:

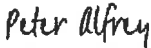
BerryDunn submitted a Staffing Plan and Scope of Work (SOW) document to assist the West Virginia Department of Human Services (DoHS), Bureau for Medical Services (BMS) by providing support for the Organizational Development Project Phase II under our master contract (CMA # HHR21*03). As stated in the SOW document, the duration of this work is estimated to be 12 months. BerryDunn agrees to a SOW start date effective July 22, 2024.

Assuming a start date of July 22, 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 Medical Services (BMS)

Organizational Development Project Phase II

Staffing Plan and Scope of Work

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



Submitted by:

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

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

Emily McCoy, PMP®, Senior Manager
emccoy@berrydunn.com

Submitted On:

June 3, 2024



Staffing Plan and Scope of Work (SOW) for the West Virginia Department of Human Services (DoHS), Bureau for Medical Services (BMS) Organizational Development (OD) Project Phase II

This scope of work (SOW) describes the tasks BerryDunn will perform to assist the West Virginia (State) Department of Human Services (DoHS), Bureau for Medical Services (BMS) with organizational development (OD) activities, including workforce onboarding and training, which were identified as needs following the strategic assessment in the OD Project Phase I. The work completed under OD Project Phase II will be completed in accordance with the terms and conditions of the Centralized Master Agreement (CMA) Number HHR21*03 BMS Project Management Services contract between BerryDunn and West Virginia DoHS.

1.0 Introduction

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

1.1 Key Information

The objective of this project is to develop and implement talent management processes (e.g., hiring, onboarding, and training employees) and help streamline other critical internal processes to improve workforce efficiency.

For OD Project Phase II, the focus will build upon the training and workforce development needs identified during Phase I to help BMS continue the following goals:

- Establishing and supporting a foundation of strategic goals and outcomes for the Medicaid program through Medicaid Information Technology Architecture (MITA) and continuous process improvement
- Supporting and investing in workforce and talent development to promote and enhance performance excellence and longevity
- Establishing a talent management strategy, including tools and technologies to support and enhance the development of the Medicaid workforce.

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

- General (Gen) 1.0 – Improve the State's effectiveness and efficiency
- Gen 2.0 – Minimize risk and maximize value from contracted services and products
- Gen 5.0 – Ensure program quality
- Gen 6.0 – Enhance and improve efficient, effective, and meaningful outreach and communication



- Operations Management (OM) 1.1 – Document OM roles, responsibilities, and business processes.
- OM 1.2 – Implement OM organization structure to align resources with core business functions

1.2 Assumptions

Estimates for this SOW are based on the following assumptions:

- The State leadership team will consist of Sarah Young, Deputy Commissioner, as the project sponsor and Jennifer Myers, Office Director of the Office of Professional Services, as the project lead.
- The State project lead will provide timely decision-making and responses to information requests from the BerryDunn project team.
- The BerryDunn leadership team will consist of Nicole Becnel as the Engagement Manager (EM), Emily McCoy as the Lead Project Manager (LPM), and John Connaughton as the Project Manager (PM).
- This work will begin upon approval of this SOW and a mutually agreed-upon date and is projected to continue for 12 months.
- All project documents—including meeting outcomes, action items, issues, risks, and decisions—will be on the State designated site and will be brought to the attention of the State project sponsor and project lead.
- Deliverables will be provided in an agreed-upon format.
- BerryDunn and the State will explore strengthening WV partnerships with states and other territories [such as the United States Virgin Islands (USVI)] and leverage any needed tools and procedures when applicable.

1.3 Project Funding

The State intends to utilize the Medicaid Management Information System (MMIS) Implementation Advanced Planning Document (IAPD) for the purposes of this SOW. The Centers for Medicare & Medicaid Services (CMS) previously approved the MMIS IAPD on May 24, 2024, for total State and federal funds in the amount of \$108,375,638 under project identifier WV-2024-04-08-MMIS-IAPDU-MITA. The estimated cost of the services to be delivered under this SOW is \$499,640 (included in the approved APD). Therefore, any additional scope added to the services to be provided under this SOW may require the State to update its MMIS IAPD to allocate additional funds for project management activities to be delivered under this SOW.



2.0 Project Scope and Staffing Plan

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

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

Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
1.0	<p>Engagement Oversight</p> <p><i>Service Approach</i></p> <p>BerryDunn's leadership team will provide oversight and coordination of BerryDunn staff, services, and deliverables.</p> <p>BerryDunn's project leadership will meet with the BerryDunn project lead and other key team members on a regular basis to discuss project status and issues impacting timely completion of the project work, and oversee BerryDunn staff, services, and review of deliverables.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> D01: Commissioner Briefing <p><i>Completion Criteria</i></p> <p>All parties will deem Engagement Oversight complete upon successful completion of the project and acceptance of the D12: Project Closeout Summary by the project sponsor or their designee.</p>	<p>Nicole Becnel Emily McCoy John Connaughton Nolan Cyr Dawn Webb</p>	240
2.0	<p>Project Execution and Control</p> <p><i>Service Approach</i></p> <p>Upon project initiation, BerryDunn will host a project kickoff meeting. In support of Project Execution and Control, BerryDunn's leadership will meet with the project sponsor on a regular basis to discuss project status and issues affecting timely completion of the work, and will oversee BerryDunn staff, services, and deliverables. Project Execution and Control will also include:</p> <ul style="list-style-type: none"> Facilitating meetings, preparing meeting materials, and taking notes for BerryDunn- and State-owned meetings 	<p>Emily McCoy John Connaughton Nolan Cyr Aaron Krinsky Hope Connard Alex Garcia Shandia Benke Hailey Holden Cate Poling Katie McDonald Kourtney Kirk Alycia Minshall</p>	500



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none"> Preparing monthly project status updates, risks, issues, and briefings for the State leadership team Managing project logs (action item, decision, issue, and risk tracking) Storing the project documentation repository in an agreed-upon SharePoint location Establishing and maintaining a schedule of onboarding and training courses being developed Establishing and maintaining the WV branded user portal and document library in the Medicaid Learning Center (MLC) Developing and maintaining monthly user progress reporting Providing technical support for users of the MLC platform <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> D02: Monthly Status Report D03: Project Schedule and Timeline D04: Monthly User Progress Reporting <p><i>Completion Criteria</i></p> <p>All parties will deem Project Execution and Control complete upon successful completion of the project and acceptance of D12: Project Closeout Summary by the project sponsor or their designee.</p>	Caitlin Cabral Carole Ann Guay Emily Hendrickson Janine DiLorenzo Jonathan Williams Jordan Ramsey Megan Hamilton KD Dobyne	
3.0	<p>Onboarding Training Program Support</p> <p><i>Service Approach</i></p> <p>BerryDunn will provide subject matter expertise to assist in the development of an Onboarding Training Program informed by the needs of BMS.</p> <p>Onboarding Training Program support activities include:</p> <ul style="list-style-type: none"> Conducting meetings, such as fact-finding sessions and training content walkthroughs, with appropriate State staff as needed Developing a course map, including training objectives, for the Onboarding Training 	Emily McCoy John Connaughton Nolan Cyr Aaron Krinsky Hope Connard Alex Garcia Shandia Benke Hailey Holden Cate Poling Katie McDonald Kourtney Kirk	2,888



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>Program</p> <ul style="list-style-type: none"> Developing, reviewing, and managing content and materials, including knowledge checks, for the Onboarding Training Program courses within the MLC Providing subject matter expertise to support Onboarding Training Program development, including content creation through storyboards and publication of the courses to the MLC platform Developing a resource library within the solution to support the onboarding training Establishing a personalized online Onboarding Training Program consisting of up to four courses <p>Deliverable(s)</p> <ul style="list-style-type: none"> D05: Onboarding Training Program Course Map D06: Onboarding Training Course 1 D07: Onboarding Training Course 2 D08: Onboarding Training Course 3 D09: Onboarding Training Course 4 <p>Completion Criteria</p> <p>All parties will deem Onboarding Training Program Support complete upon successful completion of the project and acceptance of D12: Project Closeout Summary by the project sponsor or their designee.</p>	<p>Alycia Minshall Caitlin Cabral Carole Ann Guay Emily Hendrickson Janine DiLorenzo Jonathan Williams Jordan Ramsey Megan Hamilton KD Dobyne</p>	
4.0	<p>Spotlight Training Support</p> <p>Service Approach</p> <p>BerryDunn will provide resources to assist in the development of spotlight training courses informed by the needs of BMS. Spotlight training courses are approximately 10 minutes long and are used to support BMS in training staff on ad hoc topics that may arise (i.e., the impacts of recent federal or state legislation, policy changes, impact analyses, business process flows, etc.)</p> <p>Spotlight training support activities include:</p> <ul style="list-style-type: none"> Conducting meetings, such as fact-finding sessions and training content walkthroughs, 	<p>Emily McCoy John Connaughton Nolan Cyr Aaron Krinsky Hope Connard Alex Garcia Shandia Benke Hailey Holden Cate Poling Katie McDonald Kourtney Kirk Alycia Minshall</p>	700



Ref #	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>with appropriate State staff as needed</p> <ul style="list-style-type: none"> Developing, reviewing, and managing training content and materials, including knowledge checks, for spotlight training courses within the MLC Providing subject matter expertise to support spotlight training development, including content creation through storyboards and publication of the courses to the MLC platform Establishing personalized online training consisting of up to two spotlight courses, as identified by BMS <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> D10: Spotlight Training Course 1 D11: Spotlight Training Course 2 <p><i>Completion Criteria</i></p> <p>All parties will deem Spotlight Training Support complete upon successful completion of the project and acceptance of D12: Project Closeout Summary by the project sponsor or their designee.</p>	<p>Caitlin Cabral Carole Ann Guay Emily Hendrickson Janine DiLorenzo Jonathan Williams Jordan Ramsey Megan Hamilton KD Dobyne</p>	
5.0	<p>Project Closeout</p> <p>BerryDunn will prepare a Project Closeout Summary that includes an inventory of all project documentation and deliverables BerryDunn will transfer to BMS at project close. Additionally, the summary will document the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> D12: Project Closeout Summary <p><i>Completion Criteria</i></p> <p>All parties will deem Project Closeout complete upon successful completion of the project and acceptance of D12: Project Closeout Summary by the project sponsor or their designee.</p>	<p>Emily McCoy John Connaughton Nolan Cyr Aaron Krinsky Hope Connard Alex Garcia Shandia Benke</p>	200
Total Hours			4,528
Total Not-To-Exceed Cost Estimate			\$499,640



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

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

CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
9	EM	\$270	Nicole Becnel	120	\$32,400
8	LPM	\$215	Emily McCoy	360	\$77,400
11	GPM	\$180	Aaron Krinsky	600	\$108,000
11	GPM	\$180	Dawn Webb	60	\$10,800
12	SS	\$80	John Connaughton	480	\$38,400
12	SS	\$80	Nolan Cyr	720	\$57,600
12	SS	\$80	Alex Garcia	600	\$48,000
12	SS	\$80	Hope Connard	460	\$36,800
12	SS	\$80	Shandia Benke	720	\$57,600
12	SS	\$80	Halley Holden	60	\$4,800
12	SS	\$80	Katie McDonald	60	\$4,800
12	SS	\$80	Cate Poling	24	\$1,920
12	SS	\$80	Kourtney Kirk	24	\$1,920
12	SS	\$80	Alycia Minshall	24	\$1,920
12	SS	\$80	Caitlin Cabral	24	\$1,920
12	SS	\$80	Carole Ann Guay	24	\$1,920
12	SS	\$80	Emily Hendrickson	24	\$1,920
12	SS	\$80	Janine DiLorenzo	24	\$1,920
12	SS	\$80	Jonathan Williams	24	\$1,920
12	SS	\$80	Jordan Ramsey	48	\$3,840
12	SS	\$80	Megan Hamilton	24	\$1,920
12	SS	\$80	KD Dobyne	24	\$1,920
Total				4,528	\$499,640



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	Est. Hours Per Month	Est. Cost Per Month
Month 1	10	30	55	294	389	\$42,570
Month 2	10	30	55	294	389	\$42,570
Month 3	10	30	55	294	389	\$42,570
Month 4	10	30	55	284	379	\$41,770
Month 5	10	30	55	284	379	\$41,770
Month 6	10	30	55	284	379	\$41,770
Month 7	10	30	55	284	379	\$41,770
Month 8	10	30	55	274	369	\$40,970
Month 9	10	30	55	274	369	\$40,970
Month 10	10	30	55	274	369	\$40,970
Month 11	10	30	55	274	369	\$40,970
Month 12	10	30	55	274	369	\$40,970
Total	120	360	660	3,388	4,528	\$499,640



5.0 High-Level Timeline

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

Figure 1: Proposed High-Level Timeline

Task	Month											
	1	2	3	4	5	6	7	8	9	10	11	12
1.0 Engagement Oversight												
2.0 Project Execution and Control												
3.0 Onboarding Training Program Support												
4.0 Spotlight Training Support												
5.0 Project Closeout												



BerryDunn Authorized Signature

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

20AAMMAD83M77

Signature

6/3/2024

Date

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

J Myers

Signature

6/6/2024

Date



Appendix A: Resumes

Nicole Becnel, PMP®

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

Overview

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

Experience

BerryDunn (06/2010 – present)

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

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



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



- *HIT Statewide Strategic Plan development (2012 – 2014)*
- *Provider Enrollment (2012 – 2015)*
- *MITA 3.0 Organizational Redesign (2013)*
- *Policy Workflow Assessment (2013)*

WV Department of Human Services (DoHS)

- *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (07/2020 – present)*
Nicole is the Lead Project Manager for the EDQ Assistance Project to support initiatives to optimize MCO encounter data processes for BMS's risk-based managed care programs. Nicole leads the project team that is assisting the State with the retirement of a historical file submission process between the MCOs and the Data Warehouse/Decision Support Solution (DW/DSS) vendor and implementation of a fully compliant 837 encounter data process with the State's fiscal agent and Medicaid Management Information System (MMIS) vendor. BerryDunn provides ongoing project management support; diagnoses and assesses necessary modifications to the MMIS as it relates to encounter data; supports the development, deployment, and implementation of applicable MMIS edits and enhancements to support compliance encounter data processes; and supports, monitors, and troubleshoots MCO testing and deployment of 837 files.
- *Electronic Visit Verification (EVV) Solution Implementation Project (03/2018 – 06/2023)*
Nicole led the project team implementing the overall EVV solution. Her work included strategic planning, organizational change management, requirement development, Request for Proposals (RFP) draft narratives and supporting documentation efforts, certification planning and assistance, Advance Planning Document (APD) development and updates, evaluation and scoring support/facilitation, vendor onboarding, vendor deliverable review, and User Acceptance Testing (UAT) planning and support.
- *Integrated Eligibility Solution (IES)/People's Access to Help (PATH) Procurement Support and Design, Development, and Implementation (DDI) Project Management (10/2015 – present)*
Nicole is the Lead Project Manager for WV's largest information technology transformation project, the Medicaid Enterprise IES, known as PATH. PATH supports the eligibility, enrollment, and administration of the DoHs's programs, including Medicaid, Children's Health Insurance Program (CHIP), Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. Nicole provides executive leadership working with the internal team, the State, and all vendors. She reviews, coordinates, and oversees statements of work (SOWs), deliverables, and risk and issue management.
- *APD Assistance (07/2010 – present)*



Nicole is the Lead Project Manager overseeing the development and approval of APDs to help the State obtain federal funding for Medicaid Enterprise System modernization initiatives such as the Medicaid performance management and quality assurance, third-party liability (TPL) planning, adding CHIP data to the Medicaid DW, Payment Error Rate Measurement (PERM), and the PATH implementation. Nicole's guidance within the APD process has helped WV secure and maintain millions of dollars in federal funding.

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



findings reports for each MCO and prepared an Ongoing Performance Monitoring Transition Plan and facilitate a Virtual MCO Systems Review to assist WVCHIP in assessing MCO readiness.

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

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

- *Provider Management Support (07/2019 – 01/2021)*

Nicole served as the Lead Project Manager assisting WV with its leverage and reuse initiatives demonstrating the Leverage Condition established by Centers for Medicare & Medicaid Services (CMS) in the Medicaid Information Technology Architecture (MITA) Seven Standards and Conditions. The team also supported WV Medicaid leadership to execute a multi-state collaborative where states can collaborate, share information, and brainstorm solutions. Nicole led the project team that has supported WV with this initiative. Since its inception, WV has increased membership to 12 state partners that participate monthly.

- *Substance Use Disorder (SUD) Waiver Initiative Project (07/2016 – 06/2017)*

Nicole was the Lead MMIS Project Manager overseeing the SUD waiver initiative "Creating a Continuum of Care for Medicaid Enrollees with Substance Use Disorders" Section 1115 waiver demonstration. The waiver allows the State to strengthen its SUD delivery system to improve the care and health outcomes for State beneficiaries with SUD through expanded SUD service coverage and new programs to improve quality of care. The team provides annual and quarterly reporting to CMS and financial reporting requirements for budget-neutrality, future technology procurements to support the five-year demonstration, and MCO contract requirements specific to the SUD demonstration.

- *MITA 3.0 State Self-Assessment (SS-A) Maintenance and Annual Update Assistance Project (08/2015 – 01/2020)*

Nicole was the Lead Project Manager for BMS's MITA SS-A efforts, including the annual maintenance of SS-A activities and Data Management Strategy (DMS). She leads the organization development planning to support WV's MITA maturity and modernization efforts. The team is creating a road map and schedule to help the State assess areas for improvement and change specific to departmental and Bureau structure, operational improvements, talent development, and training. Organization development for the project will take the MITA SS-A findings and



focus on the DoHS goals and objectives for its MMIS, the technical architecture assessment of the State's Medicaid modules' maturity levels, and business area assessments of the State's Medicaid system modules. These activities clarify BMS's short-term and long-term strategic goals and help BMS request enhanced federal funding to achieve those goals.

- *Project Management of MMIS Procurement, DDI, and Certification (12/2012 – 09/2013)*

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

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

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

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

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

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

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

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

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

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



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

- **Project Manager for MIHMS Provider Enrollment**

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

- **WV MMIS**

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

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

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

- **Project Management Support**

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

Presentations

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

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



Emily E. McCoy, RN, BSN, PMP®

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

Overview

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

Experience
BerryDunn (07/2016 – present)

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

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

WV Department of Human Services (DoHS)

- *Eligibility and Enrollment Implementation Assistance (01/2018 – present)*
Emily is currently the deputy project manager within the State PMO, leading and providing oversight to various teams within the project, including Requirements and Design, Deliverables, Testing, Organizational Change Management, and Certification and Compliance. Emily can combine her experience and knowledge of State policy and system implementations with this unique opportunity to integrate three separate systems to improve service delivery to State citizens.
- *Public Health Emergency (PHE) (10/2021 – 7/2022)*
Emily served as a subject matter expert (SME) for the PHE "Unwinding" project. Emily's State government employment and eligibility experience allowed her the opportunity to work with the State to create a strategic plan to help it with



unwinding efforts and get the policies and eligibility processes back to a pre-COVID state once CMS determines that these PHE flexibilities will end.

- *Portfolio Coordination and Management (PCM) (11/2020 – 10/2021)*
Emily served as the project manager for the PCM project, leading a team providing project management and support services to assist with the continued establishment of PCM processes and templates to help DoHS align and manage its projects across the enterprise. Emily's State government employment experience, coupled with her knowledge of project and portfolio management, provided a valuable perspective and ability to help the State obtain its desired outcomes.
- *Enterprise Program Management Office (EPMO) Project (11/2019 – 10/2020).*
Emily served as the project manager for the West Virginia DoHS EPMO project, leading and providing oversight to a team of individuals assisting the State in the establishment of its own PMO. This project focused on leveraging and developing tools, templates, processes, and plans for the State to utilize as they begin to establish the PMO and focus on gaining adoption within the organization. Beginning in March 2020, the EPMO project began identifying projects across West Virginia DoHS that were impacted by the COVID-19 outbreak and started utilizing some of the project artifacts to navigate through project and program management during a public health emergency (PHE). This work included building upon existing vendor relationships with Optum and DXC to apply system modifications to accommodate necessary PHE actions.
- **New Jersey Division of Medical Assistance and Health Services (DMAHS)**
 - *MMIS Modernization (7/2022 – 12/2023)*
Emily serves as the Engagement Manager for the Project Management Office (PMO) in collaboration with the Implementation Team Office (ITO). The MMIS Modernization is the opportunity for NJ DMAHS to update their monolithic legacy MMIS with a modular approach within the CMS guidelines. Emily is leading a team of experts in areas of project management, documentation support, deliverable review, certification support, testing support, Advance Planning Document (APD) support, Medicaid Information Technology Architecture (MITA) support, and change control.
 - *MMIS Implementation and Certification Leverage and Reuse Project (04/2017 – 01/2018)*
Emily led the BerryDunn Medicaid testing team, in collaboration with the New Jersey Implementation Team Organization (ITO), for the Replacement MMIS (R-MMIS). She applied her West Virginia MMIS testing experience to the implementation of the New Jersey R-MMIS.
- **Henrico County, VA**
 - *Henrico Area Mental Health and Development Services (HAMHDS) EHR System Consulting (08/2016 – 04/2017)*
Emily was a key resource on BerryDunn's team to provide Henrico with planning



and procurement support for its EHR system, which incorporates behavioral and mental health, and substance abuse services. The work included requirements development, RFP development, and system selection.

West Virginia Department of Health and Human Resources (DHHR), Office of Management Information Services (OMIS) (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 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.0, ICD-10, MITA, and Transformed Medicaid Statistical Information System (TMSIS)
- Participating in CMS Pilot Certification gate level reviews with CMS representatives, including presenting system evidence to meet MITA 3.0 requirements
- Participating in the development and review of the MMIS RFP
- Participating in the development and updates of various APDs, as well as seeing these documents through to approved status with CMS
- Oversight and Management of the Adult Medicaid Quality Grant
- Management of and participation in an MMIS implementation from RFP development through implementation, as well as post-implementation monitoring and defect resolution

West Virginia Bureau for Medical Services (BMS) (01/2003 – 10/2013)

During her 10 years with BMS, Emily held several positions, as described below.

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



provider compliance with Medicaid policies for reimbursement, and providing formal and informal education to providers regarding State Medicaid policies and reimbursement.

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

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

- **Transitional Care Unit (05/1999 – 12/2002)**
 - *Clinical Management Coordinator.* Emily served in a hospital-based skilled nursing unit with overall duties involving the management of nursing and ancillary staff, as well as assisting in program administration to maintain compliance with federal long-term care regulations.
 - *MDS Coordinator.* Emily served in a hospital-based skilled nursing unit with overall duties involving the coordination of the federally mandated Resident Assessment Instrument (RAI) process.
 - *Clinical Nurse II.* Emily served on a 19-bed skilled nursing unit with overall duties involving the advocacy of residents while providing direct resident care. The focus was to provide quality, holistic skilled care to residents while complying with federal long-term care certification requirements.

- **Neuroscience Unit (01/1998 – 05/1999)**

As a Clinical Nurse II, Emily served on a neuroscience unit with overall duties involving the advocacy of patients while providing direct patient care to individuals with neurological conditions. Specific duties included:

- Performing various nursing duties including, but not limited to, preventing and / or managing altered skin integrity with patients experiencing compromised mobility as well as providing tracheostomy, gastric tube, central line, and ventilator care
- Performing duties of temporary charge nurse, including the supervision of staff providing direct patient care and monitoring staffing patterns based on the Medicus system recommendations
- Serving as a representative on the Standards and Practice Council and Procedures sub-committee
- Providing formal and informal education as the unit CAD (Continuous Analgesia Device) Pump instructor and RN preceptor
- Serving as the study coordinator for Nursing Process Quality Improvement with an additional focus placed on the study of pain management in neurological patients



- **Behavioral Health Unit (07/1996 – 01/1998)**

Emily began her nursing career on the Behavioral Health Unit. Overall duties involved the advocacy of patients while providing direct patient care to individuals with mental illness.



Aaron Krinsky, MS

Proposed Project Role:	General Project Manager
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	Master of Science, Design, Business, and Technology, University of Southern California (2020) Bachelor of Arts, Philosophy, Yale University (2003)

Overview

Aaron is an accomplished and creative consultant with multifaceted experience and a proven ability to re-energize and restructure digital organizations, develop strategic initiatives, and capture emerging business opportunities. He is a results-oriented, decisive leader adept at forging lucrative relationships with key partners, vendors, clients, and employees.

Experience

BerryDunn (06/2023 – present)

As a Senior Consultant with BerryDunn's Medicaid Practice Group (MPG), Aaron works with Medicaid clients to manage and support various aspects of video production and Medicaid-systems related media content development.

- **State of Hawaii (HI)**

Department of Human Services, Hawaii Med-QUEST Division

- *Technology & Innovation SME (07/2023 – present)*

As the technology lead within his practice group, Aaron has utilized his years of knowledge and expertise to lead the development and creation of training modules for this Medicaid client. Key elements of this role include:

- Designing the business processes to support module creation
- Oversight of production and post-production elements of video editing
- Working closely with the Learning Management System (LMS) team lead to create a seamless platform experience for users

High-Touch Capital (HTC) (05/2012 – 06/2023)

Aaron serves as a senior managing director where he manages revenue models, process flows, operations support, and customer engagement strategies. He evaluates diverse organizational systems to identify workflow, communication, and resource utilization issues; creates detailed roadmaps of action items and project goals and provides reporting and analysis to inform budgeting and planning; and provides updates to all stakeholders on key milestones for projects. In addition, Aaron contributes to the success of client organizations by improving performance, motivation, job satisfaction, hiring practices, training programs, and management systems, and by developing and deploying customer interfaces.



- **State of Hawaii (HI)**

- **Department of Human Services, Hawaii Med-QUEST Division**

- *Technology & Innovation SME (08/2020 – 06/2023)*

- As the technology lead for this project, Aaron has utilized his years of knowledge and expertise to lead the development and creation of training modules for this Medicaid client. Key elements of this role include:

- Designing the business processes to support module creation
 - Oversight of production and post-production elements of video editing
 - Working closely with the Learning Management System (LMS) team lead to create a seamless platform experience for users

- **Veomed, LLC (01/2008 – 05/2012)**

- As a co-founder, Aaron developed a proprietary cloud-based software platform to facilitate the exchange of rich media content in the professional medical and healthcare space. He managed all branding, media, and marketing projects for the start-up. Including ground-breaking digital publishing initiatives with Columbia and NYU hospitals. Aaron was also responsible for coordinating fundraising, intellectual property, and complex legal arrangements for the company.

- **IMAX (01/2006 – 01/2008)**

- As a digital manager, Aaron coordinated and supervised the digital re-mastering (DMR) of film print production. He also facilitated department PO's, supervised dailies from the lab (CFI) for IMAX in-house screenings, coordinated internal shipments; and helped develop digital post-production workflows.


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:	12 years
Certifications and Education:	Bachelor of Science in Healthcare Leadership, Wheeling Jesuit University Associate in Applied Science, Office Administration, West Virginia University Certified Project Management Professional® (PMP®) Prosci® Certified Change Practitioner (CCP) Certified Professional Coder, American Academy of Professional Coders (CPC) Certified Outpatient Coder, American Academy of Professional Coders (COC) Lean Six Sigma Green Belt (LSSGB) Certification

Overview

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

Experience
BerryDunn (08/2017 – present)

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

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

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

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

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

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



- *Quality Improvement Initiatives Portfolio Manager (05/2019 – 01/2024)*
As quality improvement initiatives portfolio manager, Dawn provides project support in the areas of process improvement, best practices, and staffing allocations for the Fee Schedule and Edit Quality Review, PERM), and Third-Party Liability Procurement projects. Dawn also provides support to other engagement projects, including:
 - *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (05/2019 – present)*
 - *Data Improvement Project (09/2019 – present)*
 - *Public Health Emergency (PHE) Support (12/2021 – present)*
 - *Substance Use Disorder (SUD) Waiver Initiative Project (07/2017 – present)*
 - *Provider Management Support (11/2019 – present)*
 - *State Plan Review and Support (SPRS) (02/2020 – present)*
 - *Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (08/2020 – 02/2022)*
 - *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (7/2021 – present)*
- *Partnership Management Support (December 2023 – present)*
Dawn serves as the program manager for the Partnership Management Support project, managing budgets and project deliverables and collaborating closely with the client to help ensure the team fully meets the project requirements and expectations.
- *APD Consulting Services (05/2023 – present)*
Dawn currently manages the BerryDunn team for the WV Engagement with facilitating the development and approval of APDs for the West Virginia Department of Human Services (DoHS) Medicaid enterprise. This involves coordinating the appropriate staff to gather necessary information for the development of APDs, to write APD narratives, and to establish budget tables for the funding request via the Medicaid Detail Budget Tables (MDBTs). This project also includes preparing complete APDs for review, approval, and submission by BMS for delivery to the Centers for Medicare & Medicaid Services (CMS). These activities occur with the development of new APDs, as well as with annual and as-needed updates to 10 established APDs.
- *PERM Project (05/2018 – present)*
Dawn serves as the program manager for the PERM project, managing budgets and project deliverables and collaborating closely with the client to help ensure the team fully meets the project requirements and expectations. This project includes validating claims payment or eligibility errors, researching error remedies, and providing oversight for resolution of PERM errors cited for WV. Under Dawn's leadership, the project team developed and submitted a recovery package for the



PERM Review Year (RY) 2016 cycle. CMS agreed with the State's recovery package and overturned 71 errors, saving the State \$151,369. The project team reviewed 37 eligibility errors, three of which were overturned based on additional information provided to the reviewers. The project team reviewed 23 medical record errors, 10 of which were overturned. The State saved \$81,022 due to overturned errors.

- *MMIS Fee Schedule and Edit Quality Review (09/2017 – present)*
Dawn served first as project subject matter expert (SME) before beginning her tenure as project manager. She collaborates closely with the client to evaluate the MMIS fee schedules and claim edits to help ensure MMIS setup follows Medicaid policy and to provide analysis of cost savings opportunities for BMS.
- *TPL Procurement (05/2019 – 03/2022)*
Dawn serves as a program manager, overseeing the TPL Procurement project which involves Request for Proposal (RFP) development and TPL vendor selection activities. Dawn collaborates with the client and BerryDunn team members to help ensure the project team meets the project objectives and the client expectations.
- **Colorado Office of State Auditor (OSA)**
 - *Recovery Audit Contractor (RAC) (09/2023 – present)*
As the Medicaid Manager for the RAC project, Dawn provides oversight to the Medicaid teams research of State Medicaid Agencies (SMAs) RAC program to assist the Government Assurance Practice Group (GAPG) within BerryDunn in evaluating the Colorado Medicaid RAC program. Dawn collaborated directly with members of the OSA, the Colorado Department of Health Care Policy & Financing (HCPF) – the Colorado SMA, and the HCPF RAC vendor to gather information and address the findings of the evaluation.
- **United States Virgin Islands (USVI)**
 - *Project Management and APD Support (10/2022 – present)*
Dawn supports the USVI with in the development and approval of APDs to support key program initiatives. Dawn provides project management support for key initiatives to support and enhance the USVI Medicaid program.
- **Hawai'i Department of Human Services Med-QUEST Division (MQD)**
 - *Medicaid Organizational and Business Process Redesign (11/2021 – 06/2022)*
Dawn supported the MDQ in PERM corrective action planning and response.
- **State of Alaska, Division of Legislative Audit (DLA)**
 - *National Correct Coding Initiative (NCCI) Compliance Evaluation (07/2019 – 09/2019)*
Dawn supported the DLA in the development of an NCCI questionnaire to help assess Alaska Medicaid's compliance with the NCCI technical guidelines. The results of the assessment provided the DLA with confidence the Alaska MMIS complies with the NCCI technical guidelines.



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

Dawn served as the Revenue Cycle Administrator for a group of over 30 Federally Qualified Health Centers (FQHCs). In this role, Dawn was responsible for the organization's accounts receivables. This included providing oversight of each health center's frontline staff, providing communications to medical, dental, and behavioral health providers on billing and reimbursement issues. Her responsibilities included training over 400 doctors, dentists, and other health care providers and employees on the revenue cycle. Dawn worked with insurance payers such as Medicare, Medicaid—including WV, Ohio, and Kentucky—Public Employee's Insurance Agency (PEIA), and Children's Health Insurance Program (CHIP) to help secure payment for services rendered by the FQHC providers. Dawn managed the on-site implementation of a new electronic medical record and billing system, Intergy. Under Dawn's leadership and guidance, at the end of her first year of service to Valley Health Systems, Inc., the accounts receivable had increased 5% over the prior year.

Unisys (06/2004 – 11/2009)

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

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

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

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

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

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

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

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

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

Acordia National (12/1994 – 05/1996)

Dawn began her career as a medical claim examiner.


John J. Connaughton, MS

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Manager
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	Master of Science in Organization Development, American University Bachelor of Art and Science in Business Administration/Management, Fitchburg State Certificate Degree, Executive Coach, William James College Certificate in Instructional Design, Practical Management Institute Certified Diversity Practitioner Certified Emotional Intelligence EQi Certified in Lominger Voices Qualified Myers Briggs Facilitator, CAPT Certified Trainer: Inside Out Development, Situational Leadership, DDI

Overview

John is a seasoned organization development professional with over 20 years of experience. He has demonstrated skills in launching and leading talent management, learning and development, employee engagement, strategic planning, team effectiveness, performance management, diversity and inclusion, coaching and consulting in a variety of industries and organizations.

Experience
BerryDunn (09/2021 – present)

John is a manager in BerryDunn's Medicaid Practice Group. Since joining BerryDunn, John has worked on strategic planning, organization design, staffing and competency modeling, cultural assessment and transformation, leadership effectiveness and change management initiatives. John is actively engaged in the infusion of organization development practices into Medicaid Management Information System modernization projects. John maintains a specific and targeted focus on infusing DEI into, and while aligning the culture and competencies needed to achieve the organization's strategic plan.

- **State of West Virginia**
 - *Organization Development Services Project (05/2023 – present)*
John serves as a Subject Matter Expert (SME).



- **State of Hawai'i Department of Human Services**

- *Med-QUEST Health Analytics Program Strategic Planning Services Project Manager (03/2023 – present)*

As the Project Manager, John provides oversight and tracking for the project plan, schedule, budget, risks, and issues to help ensure the team meets the projects requirements and expectations. John also contributes his experience in strategic planning to the projects design and progress. The project will generate the Health Analytics Program Strategic Plan.

- **New Jersey Department of Human Services**

- *MMIS Modernization Organization Development Lead (06/2022 – present)*

As the Organization Development Lead, John assesses, designs, and deploys interventions to enhance the collective team's effective operations. John also develops project team members to be change champions and to drive change adoption throughout the project.

- **State of Iowa Department of Health and Human Service**

- *Medicaid Enterprise Modernization Effort Organization Development and Change Manager (06/2023 – present)*

As the Organization Development and Change Manager, John assesses, designs and deploys interventions to enhance the team's effective operations. John attends to enablers and barriers to effectiveness at the individual, team, and full system levels. John is also responsible for the design and delivery of the change management efforts to lead, support change resilience, and adoption.

- **Non-profit Behavioral Health Organization**

- *Organization Development Manager (09/2021 – 02/2023)*

In the role of Organization Development Manager, John enhances the organizations operations and leadership effectiveness in preparation for future growth through the assessment and redesign of the organizations structure and business processes, and the development of leadership competence.

- **State of North Carolina Office of State Budget and Management/NCPRO**

- *Administrative program design and organization development to manage statewide ARPA funding OD/HR SME (10/2021 – 07/2022)*

As the OD/HR SME, John analyzed the current and future workload due to the influx of Pandemic Relief funds to determine a workforce plan that includes the structure, oversight, roles and responsibilities, and a training plan.

Independent Consultant (2006 – 08/2021)

John served as an independent consultant in a variety of areas and with different clients. John delivered culture change focused on inclusion and belonging in a large financial institution. He engaged in the design and execution of a consultative process including data gathering through focus groups and intervention design, as well as trained a team of internal resources in the skills



of Inclusion, Diversity & Belonging. John also worked to improve communication across the team and hierarchy resulting in reduced tension and more productive relationships. This included developing a vehicle for raising challenges amongst the team and increasing employee engagement, commitment, and retention by coaching the team leader toward a climate shift. John conducted 360 interviews to understand the current leadership style and impact. He guided his client through defining development goals and supported the leader through a CEO leadership transition for a non-profit organization.

Dassault Systems (2014 – 08/2021)

As the director of talent managing and training, John designed and facilitated the annual Americas HR Strategic Planning and Objective Setting process, and the annual HR Talent Review process. He also led the annual Great Place to Work Survey process for the Americas. Great Place to Work results increased by 10 points over five years through annual region and manager action planning. He supported leaders with analysis of their results and the creation and execution of their annual action plans. In addition, John built a diversity, inclusion and belonging strategy for the Americas; facilitated the annual succession planning process across the Americas; conducted executive coaching to address performance issues or maximize high potential performance; and deployed and engaged managers and employees in the learning path and certification methodology in the Americas region.

Blue Cross Blue Shield of RI (2011 – 2014)

As the director of organizational development, John increased operational efficiency, speed of decision-making and connection to the customer while reducing operational costs, through a management review process. This effort led to consistent and appropriate spans of control and organizational layers across BCBSRI. John also designed and launched a comprehensive talent management strategy the aligned talent identification, succession planning, critical talent and critical roles risks, performance management, and learning and development.

National Grid (2008 – 2011)

As the director of talent management, John was responsible for the annual talent review and performance rating evaluation process. By leading the process, John reduced long term business operation risks by identifying secure points of succession and gaps, critical talent, and critical role risks throughout the organization. John also introduced an Executive Coaching approach for the development of identified high potential leaders and successors. The approach included tracking and measuring coaching effectiveness and value.

Wachovia Bank (1999 – 2008)

As the Vice President for Learning and Development, John designed and facilitated the ongoing and progressive curriculum for both leadership and individual contributor development programs.



Nolan Cyr, MA

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Senior Consultant
Years of Experience Relevant to Proposed Role:	5 years
Certifications and Education:	Master of Arts in Leadership Studies, University of Southern Maine Bachelor of Science in Leadership and Organizational Studies, University of Southern Maine Master Certificate in Organizational Development, University of Southern Maine

Overview

Nolan is a highly dependable and innovative consultant with experience in both organizational development and Medicaid. He has extensive knowledge of organizational systems and culture, data collection and analysis strategies, and training design, development, and implementation. Specific to Medicaid, Nolan specializes in Advance Planning Document (APD) development with extensive knowledge of APD financials.

Experience

BerryDunn (06/2022 – present)

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

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

- *APD Consulting Support Project (08/2023 – present)*

As an APD SME, Nolan supports the development, updating, and tracking of BMS APDs. In his role, Nolan drafts APD documents and budgets, supports the project management of APD development, and assures project goals and objectives are met. In addition, he helps identify and track project risks, issues, decisions, and action items for state leadership. Nolan continues to provide support specifically focused on APD financials.

- *Provider Enrollment (PEA) Project and Provider Management Support (09/2023 – present)*

Working on the PEA Project and Provider Management Support, Nolan provides project management and APD support for the provider enrollment partnership between West Virginia and the U.S. Virgin Islands (USVI). In his role, Nolan drafts APD documents and budgets, supports the project management of APD development, helps identify and track project risks. Nolan continues to provide support specifically focused on APD financials.

- *Organization Development Consulting Services (07/2022 – 06/2023)*



As a Business Analyst, Nolan assisted the State with activities specific to organizational development in West Virginia (WV). His focus was supporting the State as BMS develops and implements a three-year strategic plan. Services included aiding the design and facilitation of a multi-day strategic planning retreat, creating workshops, webinars, and e-learning courses that support strategic plan implementation, deliverable development, and meeting facilitation.

- *American Rescue Plan Section 9813: Mobile Crisis Grant Project (08/2022 – 02/2023)*

As project coordinator for the ARP Mobile Crisis project, Nolan assisted the State in planning for the implementation of the Medicaid mobile crisis services program. He conducted program coordination among involved stakeholders, captured meeting notes, tracked action items, and supported the development of project deliverables, such as the creation of the State Plan Amendment (SPA) draft.

- **BerryDunn Medicaid Learning Center (MLC) (08/2022 – present)**

- *MLC Operations Lead*

Nolan manages the platform learning management system (LMS), course content, and technical support. In this role, Nolan spearheaded the redevelopment of the platform website and course appearance to increase brand reputation and engagement with content. He regularly facilitates product overview meetings with prospective clients, assures product satisfaction, and evaluates current training materials to identify areas of improvement.

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

- *APD Consulting Services: Phase II (07/2022 – present)*

As an APD Analyst, Nolan is a part of the team supporting the Delaware DHSS DMMA APD Consulting Services Project, which includes developing, updating, and tracking of DMMA's APDs. In his role, Nolan drafts APD documents, tracks APD progress, reports monthly on project deliverables, and assures project goals and objectives are met. In addition, he helps identify and track project risks, issues, decisions, and action items for state leadership.

- **Hawaii Department of Human Services (DHS), MedQUEST Division**

- *Organizational and Business Process Redesign (11/2022 – present)*

As a Learning Platform Administrator, Nolan works with the job skills development (JSD) team to help develop and deliver over 30 comprehensive training courses and programs through BerryDunn's MLC. While supporting this project, he has established over 250 state employees on the platform who have completed more than 2,500 courses and 5,000 hours of training. His focus at present is helping to ensure user satisfaction with the platform, reporting on course completions, and delivering content that is engaging.



- **Oregon Health Authority, Health Promotion Chronic Disease Prevention (HPCDP) Section**
 - *Culture Change Management with Trauma-Informed Approach (11/2022 – present)*
As a Change Management Subject Matter Expert (SME) and Business Analyst, Nolan supports the HPCDP Section in building and maintaining an inclusive environment by engraining culture changes into defined strategic priorities and goals. His role includes the development and facilitation of agile and inclusive workshops, data collection and analysis, deliverable development, and meeting facilitation.
- **Iowa Department of Health and Human Services (Iowa HHS)**
 - *Medicaid Enterprise Modernization Effort (MEME) (09/2023 – present)*
Iowa Medicaid has launched a systems modernization initiative, beginning with solutions targeted at achieving the top business priority: improving the experience for providers and Medicaid staff in provider enrollment, screening, credentialing, and maintenance of provider information. In his role, Nolan provides organizational development and organizational change management (OCM) support for the MEME project.
- **Puerto Rico Medicaid Program (PRMP)**
 - *Enterprise Objective Monitoring and Control (EOMC) Services (09/2023 – present)*
As an APD SME, Nolan is a part of the team supporting the PRMP EOMC Services project, which includes developing, updating, and tracking of PRMP APDs. In his role, Nolan provides input and design in the drafting of APD documents, MDBT files, project templates. In addition, he helps identify and track project risks, issues, decisions, and action items for state leadership. Nolan continues to provide support specifically focused on APD financials.
- **Alaska Division of Health Care Services (HCS)**
 - *Medicaid Management Information System (MMIS) Modernization (12/2023 – present)*
As an APD SME, Nolan is a part of the team supporting the Alaska HCS MMIS Modernization project, which includes developing, updating, and tracking of Alaska HCS APDs. In his role, Nolan provides input and design in the drafting of APD documents, MDBT files, project templates. In addition, he helps identify and track project risks, issues, decisions, and action items for state leadership. Nolan continues to provide support specifically focused on APD financials.

MaineHealth (05/2019 – 06/2022)

Nolan worked as an intern with the senior HR team to develop pieces of training targeted at improving leadership competencies in directors and executives across the MaineHealth



network. He developed pieces of training on Time Mastery, Emotional Intelligence, and DiSC, as well as, assisted in the creation of MaineHealth's new leader first-year success and Leader as Coach training programs which were administered to all directors and executives. He organized and summarized annual systemwide employee engagement survey data and build a dashboard to measure and chart changes across HR metrics.

Student Engagement & Leadership, University of Southern Maine (09/2021 – 06/2022)

Nolan served as Graduate Assistant to help create meaningful connections with the campus community through engagement and leadership development opportunities. He advised and mentored student leaders, oversaw group activities, and facilitated conflict resolution. He worked as lead project manager for event sequences and envisioned and constructed a campus-wide event calendar for student groups.

Outdoor Adventures Board, University of Southern Maine (09/2017 – 05/2021)

Nolan served on the executive board, which involved tasks ranging from guiding trips to overseeing club activities. He expanded student engagement, oversaw club partnerships with outside organizations, and implemented annual club leadership and wilderness medical training retreat to improve quality and safety of trips. He also managed the budget as financial chair and coordinated local and out-of-state trips.

Publications and Presentations

Co-Presenter – *Even Covid Couldn't Stop Us: How Hawai'i Switched Gears and Created Virtual Self-Paced JSD Courses During a Global Pandemic*, Presentation for Medicaid Enterprise Systems Conference (MESC) 2023, 08/24/2023.



Alex Garcia

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Staff Consultant
Years of Experience Relevant to Proposed Role:	9 Months

Overview

Alex is an experienced professional video editor who demonstrates keen knowledge and skill with managing and developing client relationships, exceeding sales targets, and improving client satisfaction. He has experience with various programs, including Premiere, After Effects, Photoshop, and Illustrator, and is proficient in collaboration, content creation, and scheduling.

Experience
BerryDunn (07/2023 – present)

Alex is a staff consultant working with BerryDunn's Medicaid clients to support various aspects of video production and Medicaid-systems related media content development. Alex also assists with maintenance, development, and enrollment efforts for BerryDunn's Medicaid Learning Center (MLC) online application.

- **State of Hawai'i (HI)**

- **Department of Human Services, Hawaii Med-QUEST Division**

- *Organizational and Business Process Redesign (08/2023 – present)*

Alex has provided valuable support with video production of training videos, new employee orientation, and release trainings. He has also supported in-person video shoots with clients and staff, including managing full set-up with professional lighting, audio, camera, and teleprompter. Additionally, Alex has consistently demonstrated expertise with professional video editing to include color correction and audio enhancement; exported videos uploaded to Vimeo for MLC/Rise integration, and User Acceptance Testing (UAT) Environment screen shot manipulation with Photoshop to mask Personally Identifiable Information (PII).

- **MLC**

- *MLC Support*

Alex provides support with enrolling and registering new users, course creation, updates, and upkeep using Prosperity online software. Other key elements of this role include:

- Participant Guide review and creation
- Storyboard review and creation
- Experience with Articulate software: Rise, and MLC online software: Prosperity



KHON2 (04/2018 – present)

Producer, Living 808, KHON2 News (09/2021 – 09/2023)

Alex managed and developed client relationships, exceeding sales targets and improving client satisfaction. He collaborated with clients and internal teams to develop customized advertising solutions. His accomplishments included producing 80+ episodes of Living808, managing concept creation, client meetings, location scouting, and talent scheduling.

Executive Producer, Sam Choy's in the Kitchen (02/2020 – 09/2023)

Alex produced 144+ episodes of Sam Choy's in the Kitchen, managing concept creation, client meetings, location scouting, and talent scheduling. He directed camera operations, grip and lighting, and audio recording; edited and finalized episodes using Adobe Creative Suite: Premiere, After Effects, Photoshop, Illustrator; and supervised content, talent scouting, and creative authority as showrunner.

Promotions Producer, KHON2 Marketing (04/2018 – 10/2021)

As the promotion's producer, Alex produced various KHON2 branded commercials, custom client commercials, and internal promotional videos. He conducted client meetings, developed concepts, and coordinated talent scheduling. Directed camera operations, grip and lighting, and audio recording. He edited and finalized promotional videos using Adobe Creative Suite: Premiere, After Effects, Photoshop, Illustrator.

Cooking Hawaiian Style (Contracted by Carillo Digital (03/2010 – present)).

Alex has filmed over 50 episodes of Cooking Hawaiian Style as camera operator for recorded as live multi-camera shoot. As the production assistant, he has conducted studio and field pre-production lighting and set preparation, and operated Camera B under the direction of director of photography.

Let's Go Fishing Hawai'i (01/2010 – present)

As the Lead Editor/Camera Operator Alex edited 250+ episodes of Let's Go Fishing Hawai'i, conducting studio and field videography, full episode editing, graphic design, commercial traffic, music arrangements, and episode delivery. Operated camera for in-house and on-location cooking segments.

DIS-N-DAT Media Group LLC (02/2005 – 08/2017)

Alex was the director/camera operator/editor, co-producing 20+ episodes. He performed pre-production interviews, script design, videotaping, post-production creation of music videos, commercial advertising, and episode delivery.

Filming Credits

Miss Teen Hawai'i USA & Miss Hawai'i USA Live Streaming and Broadcast: TV Director (01/2023)

Stanford Med Open House at STTC: Camera Operator / Editor (02/2023)

Miss Teen Hawai'i USA & Miss Hawai'i USA Live Streaming and Broadcast: TV Director (01/2022)



Koloa Landing Kaua'i Poke Fest: TV Director / Camera Operator / Editor (05/2022)
Na Leo Mother's Day Concert Producer / Director / Camera (05/2022)
Aloha Week Floral Parade: TV Director (09/2022)
Pride Parade Live: TV Director (10/2022)
Makaha Sons Christmas Concert Producer / Director / Camera (12/2021)
Pacific Medical Administrative Group Internal Healthcare Videos: Director / Camera Operator / Editor (10/2020)
Magnum PI Behind the Scenes | Production Assistant (07/2018)
Matt Levi Investigates: Camera Assistant (05/2017) to 03/2018
PTC Closed Circuit and Online (Quick Turnaround Edit): Editor (01/2018)
Hawaiian Airlines (In Flight Music Video): Camera Assistant (07/2017)
El Capitan Lodge (PR Video): Director / Camera Operator / Drone Operator / Editor (06/2017)
HMSA (Oprah VNR): Editor (06/2017)
Hawai'i Tourism Authority (Henry Kaponu Live Stream): Camera Operator (05/2017)



Hope Connard, PHR, SHRM-CP

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Manager
Years of Experience Relevant to Proposed Role:	20 years
Certifications and Education:	<p>Bachelor of Arts, Human Resource Management, University of Arizona</p> <p>PHR (Professional in Human Resources)</p> <p>SHRM-CP (Society for Human Resource Management – Certified Professional)</p> <p>SHRM Member - Society for Human Resource Management</p>

Overview

Hope is a consulting manager presenting with 30 years of progressive Human Resources (HR) experience and 20+ years of HR risk management and payroll compliance experience. Hope demonstrates 10 years of knowledge in HR consulting in a Professional Employers' Organization (PEO) environment for a variety of industries. Most recently, Hope held the role of Senior HR manager within Berry Dunn's HR department, reflecting her commitment to organizational excellence. By adeptly navigating intricate employment issues, she has facilitated smooth transitions and minimized disruptions within the firm. Her expertise in HR operations, HR risk management, and organization effectiveness has been pivotal in identifying and mitigating potential risks while driving positive transformation initiatives. Through her strategic approach, she has not only enhanced existing HR policies and processes, but also championed innovative solutions to better serve the needs of the organization and its employees. With a focus on coaching, development, and helping ensure compliance and adherence to high standards, she has effectively collaborated with leaders to foster a culture of accountability and continuous improvement, contributing to the firm's overall success.

Experience

BerryDunn (12/2019 – present)

Hope is a consulting manager focusing on organization effectiveness within Berry Dunn's Medicaid Practice Group (MPG) area.

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

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

- *WV Engagement Support (05/2024 – present)*

- Hope supports the WV engagement by collaborating with the engagement leadership to help ensure project goals and deadlines are met. She performs a



variety of overflow engagement coordination duties, such as documentation/deliverable reviews and other project management activities.

- **State of Hawaii**

- *Business Process Redesign and Associated Services (12/2023– present)*
As co-lead, Hope provides organization change management expertise that supports the organization transformation project.

- **CareOregon**

- *HR – Job Family Review & Consolidation (10/2023 – 01/2024)*
Hope served as the project lead in a comprehensive assessment of the organization's job family structure. Working with the HR department, her role encompassed providing expert analysis and crafting strategic recommendations to streamline job roles through consolidation and redesign in alignment with CareOregon's strategic vision to improve operational efficiencies.

Employers' Innovative Network (03/2010 – 12/2019)

Hope served in an executive-level capacity, spearheading corporate and client HR initiatives. Overseeing HR operations, consulting, and outsourcing services, she garnered extensive knowledge across various industries, including union and non-union environments spanning multiple states. Providing guidance to internal and external stakeholders, she offered expertise in employment relations and risk management. Leading a team, she played a pivotal role in developing an online training platform and spearheaded initiatives to create valuable and relevant training content. Collaborating on various projects, she innovatively designed employee benefit programs tailored to meet the needs of both employees and client employers. Additionally, she collaborated with fellow leaders to identify and implement a multi-client HRIS platform, all while maintaining a focus on initiatives aimed at enhancing organizational effectiveness.

NGK Sparkplugs (04/2007 – 03/2010)

In her role as an HR Administrator for a global manufacturer, Hope managed recruitment efforts, payroll administration, and drove enhancements in HR processes. She played an active role in employee engagement initiatives and supported training and development programs in West Virginia operations. Engaging with Kaizen groups, she focused on improving organizational effectiveness. Notably, her pivotal involvement in relocating import operations from Detroit to Charleston underscored her ability to liaise effectively between US and Japan operations. Additionally, she conducted meticulous audits, data analysis, and aided in implementing a new inventory platform. Hope's unwavering dedication to continuous improvement, particularly through her engagement with Kaizen programs, epitomized her commitment to operational excellence.

IT Alliance of Appalachian Ohio (04/2003 – 04/2007)



Hope worked as a HR Generalist for a non-profit focused on improving IT awareness for the southeastern Ohio region. She managed staff and independent contractors for special events tied to IT initiatives. She was responsible for managing HR and payroll responsibilities and grant management. Special projects Hope led for this initiative included creating and managing a job board for interns and professionals entering the IT profession and coordinating events for the IT sector.



Shandia Benke, ECBA™

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



Halley 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 – present)

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

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

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

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

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

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

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

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

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



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

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

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

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

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

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

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


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 Project Management Professional (PMP®) (<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) Minimum Acceptable Risk Standards for Exchanges (MARS-E) Security Assessment (11/2023 – 03/2024)***

- 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.

- ***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.

WV Bureau for Medical Services (BMS)

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

Katie assists with MITA lifecycle 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.

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

Katie provides project coordinator assistance with implementing its five-year plan to improve the continuum of care for children and families, pursuant to DoHS'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.



Cate Poling

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

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 (RFPs), 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. As Co-Chair of the Engage Employee Resource Group (ERG), Cate also supports BerryDunn's efforts to be an industry leader in promoting Diversity, Equity, Inclusion, Belonging, and Access (DEIBA) practices within the firm and within client and vendor relationships.

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) (05/2023 – present)**

- *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) (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.

- *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)

As a Certified Ophthalmic Assistant, Cate 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, 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.



Kourtney Kirk

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

Overview

Kourtney is an experienced project coordinator and consultant with an extensive knowledge of documentation, communications, and scheduling needs related to Medicaid Enterprise Systems development. Her attention to detail and complex organization skill sets have allowed her to be a valuable team member across multiple projects, with the ability to assist in drafting contract deliverables, tracking action items, risk, and issues, developing and distributing project agendas and meeting materials, as well as aiding in the creation of 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) Eligibility and Enrollment Implementation Assistance (10/2022 – present)*
 - *Medicaid Enterprise Data Solution Implementation and CMS Certification Project (08/2020 – 01/2022; 10/2022 – present)*

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

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

As a project coordinator for People's Access to Help (PATH), the Enterprise Data Solution (EDS), and MCES projects, Kourtney has a wide range of project duties. She creates agendas, maintains meeting schedules, and provides quality control



for meeting materials to satisfy contract Service Level Agreements (SLAs). She maintains project information and tracks action items, risks, issues, and decisions, in addition to developing and distributing meeting minutes. As the lead coordinator for the EDS Project, she assists in the creation and maintenance of Advance Planning Documents (APDs), project deliverables, and budgets, creates monthly status reports, and maintains project rosters for the Project Management Office (PMO), client, and vendors. As a project consultant, she assists with research communication needs across various project workstreams.

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

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

TEKSystems (08/2020 – 01/2022)

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

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

- *Business Development Representative and Scheduling Coordinator (08/2019 – 08/2020)*

Kourtney worked on the Microsoft Software Asset Management + Compliance Campaign to support Microsoft Account Executives and clients, scheduled meetings between clients and Microsoft AE's to upgrade their software products, and contact potential clients through phone calls and emails. She sent meeting invites, action items, and follow-ups to the Account Executive and clients, utilized Teams for virtual meetings and conference bridges for phone meetings, and completed each meeting with follow-up summary.

- *Business Development Representative (03/2018 – 11/2018)*

Kourtney worked directly with Microsoft as an Inside Sales Account Executive for Unified Support Gained on a full cycle sales experience with Microsoft's new support services. She displayed interpersonal skills and a positive attitude toward client and coworkers, successfully communicated with contacts via the phone dial, and identified the key aspects of a potential lead, including need, budget, and time frame. Kourtney obtained general knowledge of the IT industry, with the capacity to learn about individual systems and products quickly and accurately for marketing purposes. She met with regular quotas of calls and qualified leads, communicated information about calls accurately and effectively to management and clients, effectively managed time and worked well independently or under supervision, and managed client relationships.



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

Kourtney served as a Logistics Account Manager who was the primary contact for clients and independent freight carriers. She presented sales presentations to prospective clients, created a list of ongoing business accounts via prospecting networking and referrals, and managed daily shipments and confirmed pick-up and delivery of shipments. She communicated proactively customers and freight carriers daily, provided clients with the highest level of customer service and support to retain their business, and enacted responsive customer service to resolve client issues quickly and efficiently.

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

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



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.



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 a member 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.



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.
- **Department of Vermont Health Access**
 - *Vermont Health Connect Financial and Programmatic Audit (01/2016 – present)*
Carole Ann currently serves as the project coordinator on the State's financial and programmatic audit of its Health Insurance Exchange completed for FYE 6/16 and in progress for FYE 6/17 to determine whether the exchange is in material compliance with 45 CFR 155.
- **Minnesota Health Benefit Exchange (MNSure)**
 - *Programmatic Audit (10/2015 – present)*
Carole Ann is the project coordinator for BerryDunn's audit team assessing whether MNSure's program is compliant with all federal requirements as BerryDunn performs the programmatic audit for the State's health insurance exchange.
- **Sacramento Municipal Utility District (SMUD)**
 - *Information Security Audit (08/2016 – 12/2017)*
Carole Ann provided documentation support and deliverable assistance for SMUD's Information Security Audit.
- **Massachusetts State Ethics Commission**
 - *CMS Planning and Implementation Services (04/2017 – 06/2017)*
Carole Ann provided deliverable support, as well as data gathering and organization for this project. She also participated in on-site fact-finding meetings.
- **Washington State Auditor's Office (SAO)**
 - *Local Government IT Security Audits (11/2014 – 06/2017)*
Carole Ann served as a technical analyst assisting in the performance of information security audits for various municipalities throughout the State of Washington, sponsored by the SAO, conducting assessment activities and analysis of current environments. The team assisted in identifying threats, vulnerabilities, and risks, in addition to providing recommendations for remediation.

Webber Energy Fuels (2004 – 2014)

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



Emily Hendrickson

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Documentation Specialist
Years of Experience Relevant to Proposed Role:	11 years
Certifications and Education:	Bachelor of Arts in English Literature and Language, Gordon College Bachelor of Arts in Biblical and Theological Studies, Gordon College Poynter ACES Certified Editor

Overview

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

Experience

BerryDunn (07/2017 – present)

Emily provides editorial and quality reviews of client deliverables such as IT strategic plans, feasibility studies, and assessment reports for the government consulting group. She supports BerryDunn consultants, offering content revision suggestions and helping to ensure that quality, style, and branding standards are met for all deliverables. She has developed and delivered numerous writing presentations focusing on best practices and addressing common business writing challenges.

Christianbook (06/2021 – present)

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

Rose Publishing/Tyndale House (02/2021 – 12/2021)

As freelance editor, Emily provided content edits for nonfiction books, performing line edits and developmental edits to improve structure, flow, and readability. She regularly rewrote significant content for tone, clarity, and structure and performed information-gathering to revamp text and



fact-check quoted material.

Martin's Point Health Care (04/2016 – 07/2017)

As a patient services representative, Emily was responsible for queue management, including appointment scheduling. She collaborated with the health information management team to identify areas for improvement in document tracking to help close care gaps and increase quality measure metrics.

Youngclaus & Company (01/2016 – 04/2017)

As a tax return collector for the 2016 and 2017 tax seasons, Emily scanned client financials and helped to ensure accurate electronic filing of both client and account documents in company database per standard workflow. She performed quality review of documents after scanning to confirm completeness of the electronic file.

Seacoast Christian School (09/2014 – 06/2015)

Emily taught English and Creative Writing, adapted lesson plans to achieve short- and long-term educational objectives and demonstrated classroom management skills while inspiring students to succeed.

Civil Consultants (09/1999 – 07/2014)

As an administrative assistant, Emily provided daily front-desk management of engineering and surveying firm—typing, editing, and proofreading proposals, project submittals, and correspondence; printing and assembling reports; and maintaining paper and electronic filing. She was also responsible for graphic design work.

Foster's Daily Democrat (04/1996 – 08/1999)

As a newspaper copy editor, Emily worked on the news desk editing reporters' stories for syntax, grammar, style, and content.



Janine DiLorenzo

Proposed Project Role:	Project Management Support Staff
Role at BerryDunn:	Documentation Specialist
Years of Experience Relevant to Proposed Role:	13 years
Certifications and Education:	Bachelor of Arts in Early Childhood Education, Stonehill College

Overview

Janine has more than 13 years' experience writing reports, grants, and outreach materials, designing graphics and publications, and creating communication/organizational systems in education and non-profit organizations. She has worked with educational institutes to develop skills in project management, communication, and planning.

Experience**BerryDunn (01/2022 – present)**

Janine is responsible for proofreading, copyediting, and formatting client deliverables, including project management documents, proposals, reports, memos, presentations, and meeting notes.

Breakwater School (08/2019 – 08/2021)

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

Community Connections of Brockton (06/2011 – 06/2018)

- **Program Coordinator (06/2014 – 06/2018)**
Janine worked to organize the Clemente Course in the Humanities and a cohort of College Unbound—alternative higher-education opportunities for economically disadvantaged adults—in partnership with local colleges, non-profits, and public/private funding sources. She taught writing and portfolio development to diverse groups of adult students matriculating into undergraduate programs. She worked on editing with students, designed outreach materials, set up databases, and reported on program outcomes. Janine led internal and external communications, and managed all program operations while also writing successful grant applications and sponsorship appeals to secure public and private funding.



- ***AmeriCorps*VISTA, Brockton's Promise Coordinator (08/2012 – 08/2013)***
Janine coordinated communications and logistics among five committees in a cross sector, citywide coalition that addresses youth education, health, safety, and civic engagement. She led strategic planning process to heighten coalition's impact, calling for comprehensive, coordinated service delivery. She rewrote the mission, vision, and goals to better reflect coalition's purpose. She published a research-based series of indicators for Brockton's Promise to measure the well-being of the city's youth and assess collective impact and wrote copy for website and social media outreach channels.
- ***AmeriCorps*VISTA, Brockton Parents Magazine (06/2011 – 08/2011)***
Janine led all aspects of production for the inaugural issues of Brockton Parents Magazine, in partnership with parent volunteer editorial team. She assigned, wrote, and edited articles; solicited and created advertisements, laid out 32-page full color spreads in InDesign; and completed pre-press packaging procedures for printing. Janine grew a 10,000-copy distribution via businesses, schools, municipal buildings, and social service agencies.

Stonehill College (08/2010 – 05/2011)

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



Jonathan “Jon” Williams

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

Overview

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

Experience
BerryDunn (02/2019 – present)

Jon serves as an editor for BerryDunn’s Consulting Team, tasked with proofreading and copyediting meeting notes, memos, and PowerPoint presentations for various government entities. This requires helping to ensure that documents conform to BerryDunn’s formatting and writing standards.

Freelance Proofreader and Copyeditor (11/2010 – present)

Jon has worked with Ertel Publishing to proofread several niche magazines, as well as with Gypsy Publications to copyedit children’s books, novels, and various other local publications.

Midwest Tape (11/2004 – present)

Jon proofreads monthly catalogs and weekly newsletters, as well as various other printed and digital documents. He writes copy for advertisements, service brochures, the company blog (mwtnnewsandviews.com), social media, and other projects. He serves on a committee that established the company’s brand guidelines and now works to help ensure those guidelines are followed on all materials, internal and external.

Mitchell Equipment Corporation (02/2002 – 11/2004)

First as a visual software operator and later as a purchasing manager, Jon was responsible for contacting vendors to purchase items needed for manufacturing jobs, for stock, or for general shop or office use. He worked with Engineering and Sales to determine needs and order accordingly and met with current and potential vendors. He scheduled service or maintenance for equipment, operated manufacturing software, and served as office/shop liaison.

Spring Hill Nurseries (02/2001 – 06/2001)



Jon proofread catalogs and mailing pieces for this direct-mail horticulture group. He checked facts, layout, grammar, and spelling, and wrote copy for planting guides included with shipments.



Jordan Ramsey, MA, 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:	Master of Arts in English: Professional Writing, Southeast Missouri State University Bachelor of Arts in Liberal Arts and Sciences, English Literature and Creative Writing, University of Illinois at Urbana-Champaign Lean Six Sigma Green Belt Certification (LSSGB) Poynter ACES Certified Editor

Overview

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

Experience

BerryDunn (07/2019 – present)

In his role as Senior Writer/Editor, Jordan manages a team of editors and proofreaders who work in Portland, ME, and remotely across the country. He was responsible for implementing a new submission ticketing system for Editorial/QA, as well as organizing multiple years of fiscal year Editorial/QA data, communicating with consultants regarding edits and turnaround times, and creating and providing multiple writing presentations. He also led an effort for the entire Consulting Team (approximately 350 people at the time) to install and utilize the PerfectIt software, an application that checks for consistency in documents.

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

Portland Adult Education (2019)



Jordan delivered writing instruction to international students and taught Level 100 and 200 English courses. In addition, he was responsible for assessments and level placement for students.

Pearson Smarthinking Writing Lab (2017)

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

Southeast Missouri State University (2015 – 2017)

As a graduate assistant, Jordan taught English Composition and aided in the delivery of the Introduction to Creative Writing course, leading workshops in poetry and fiction and facilitating group work. In addition, he wrote book reviews and reviewed authors' submissions for the *Big Muddy*, an online journal published by the Southeast Missouri State University Press.

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

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

The Southern Illinoisan (2014 – 2015)

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

Other Teaching Experience (2006 – 2010)

- **Lanier Technical College**

As adjunct instructor, Jordan created curriculum and instruction of multiple English courses, including Remedial English, Introduction to Composition, and Technical Writing. He taught approximately 90 students per quarter and served as English tutor for the College Student Success Program.

- **Hardin County, IL**

Jordan taught English at the elementary, middle, and high school levels as a substitute teacher.

- **NOVA Group of Japan**

Jordan worked as an English instructor, teaching conversational English to students with varying degrees of English literacy.



Megan Hamilton, 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 West Virginia to provide documentation support.

Fiverr (05/2022 – 12/2022)

Megan served as a Freelance Editor and Proofreader on professional documents for clients.

Institute of Reading Development (05/2021 – 08/2021; 05/2022 – 12/2022)

Megan served as a teacher responsible for instructing reading and writing for students in kindergarten through college. She organized and conducted meetings with parents regarding reading assessments and progress.

Carnegie Mellon University (08/2021 – 05/2022)

Megan served as a Research Assistant to gather and articulate research findings for a range of academic projects

Brainchild Literary Magazine (08/2020 – 05/2021)

Megan served as Editor in Chief to lead the process of soliciting poetry and prose submissions. She collaborated with staff to select and edit submissions and led discussions with staff about goals of publication and establishing a social media presence.

Academic Success Center (08/2018 – 05/2021)

Megan served as a tutor and as Program Assistant to facilitate team meetings, assist with new tutor observations, and evaluate study materials. She assisted professors with navigating student technology and academic material.



Seglian Manufacturing Group (01/2012 – 01/2022 [seasonal])

Megan served as an administrative assistant, directly under Finance Director, to edit and update pertinent documents for ISO auditing and company records. She created MS Excel report to support General Ledger and maintained company records and documents to meet tax guidelines.



KD Dobyne

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

Overview

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

Experiences

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 lead and oversaw the planning and execution of fundraising and events, while staying on schedule and within the organization's budget.

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

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



Appendix B: Deliverable Dictionary

Table 4: Deliverable Dictionary

Deliverable #	Deliverable Name	Deliverable Description
01	Commissioner Briefing	Monthly status update for the project, including project health
02	Monthly Status Report	Monthly status update for the project, including project health
03	Project Schedule and Timeline	The overall schedule for the project and the timeline to reflect project milestones
04	Monthly User Progress Reporting	The monthly report designed to reflect users' progress of onboarding training courses within the MLC
05	Onboarding Training Course Map	The planning document outlining the content and target outcomes of the onboarding training courses
06	Onboarding Training Course 1	The first of up to four customized onboarding training courses in MLC as identified by BMS
07	Onboarding Training Course 2	The second of up to four customized onboarding training courses in MLC as identified by BMS
08	Onboarding Training Course 3	The third of up to four customized onboarding training courses in MLC as identified by BMS
09	Onboarding Training Course 4	The last of four customized onboarding training courses in MLC as identified by BMS
10	Spotlight Training Course 1	The first of up to two customized spotlight training courses in MLC as identified by BMS
11	Spotlight Training Course 2	The second of up to two customized spotlight training courses in MLC as identified by BMS
12	Project Closeout Summary	The Project Closeout Summary will include an inventory of all project documentation and deliverables being transferred to BMS at the project close. The Summary will also document the disposition or reassignment of all action items, issues, and risks that remain open to an agreed-upon State operations team member.



Appendix C: Acronyms/Abbreviations

Table 5: Acronyms/Abbreviations

Acronym/Abbreviation	Definition
APD	Advance Planning Document
BMS	Bureau for Medical Services
CL	Commodity Line
CMA	Centralized Master Agreement
CMS	Centers for Medicare & Medicaid Services
DoHS	Department of Human Services
EM	Engagement Management
Gen	General
GPM	General Project Manager
IAPD-U	Implementation Advance Planning Document Update
LPM	Lead Project Manager
MITA	Medicaid Information Technology Architecture
MLC	Medicaid Learning Center
MMIS	Medicaid Management Information System
MPG	Medicaid Practice Group
OD	Organizational Development
OM	Operations Management
PM	Project Manager
SOW	Scope of Work
SS	Support Staff
State	West Virginia
USVI	United States Virgin Islands



STATE OF WEST VIRGINIA
DEPARTMENT OF HUMAN SERVICES
BUREAU FOR MEDICAL SERVICES

Cynthia A. Persily, Ph.D.
Cabinet Secretary

Cynthia Beane
Commissioner

DATE: June 5, 2024

TO: Crystal Hustead
Senior Buyer
State of West Virginia Purchasing Division

FROM: Althea Greenhowe *Althea Greenhowe*
Procurement Specialist, Senior
Office of Shared Administration/Purchasing

RE: PF1443215, CDO BMS24*61
Dept 0511

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

These services are to assist the West Virginia Department of Human Services (DoHS) Bureau for Medical Services (BMS) by providing support for Organizational Development Project Phase II. The service period 07/22/2024-06/14/2025. The total estimated cost is \$499,640.00.

Please feel free to contact me if additional documentation or details are needed. I can be reached at 304-352-3924 or althea.m.greenhowe@wv.gov. Thank you for your time and consideration in this matter.





STATE OF WEST VIRGINIA
DEPARTMENT OF HUMAN SERVICES
BUREAU FOR MEDICAL SERVICES

Cynthia A. Persily, Ph.D.
Cabinet Secretary

Cynthia Beane
Commissioner

DATE: June 5, 2024

TO: Office of Shared Administration/Finance

FROM: Lakendra Burdette *LB*
Procurement Specialist

RE: PF1443215, CDO BMS24*61
Dept 0511

The West Virginia Bureau for Medical Services (BMS) is submitting this funding memo related to the above-referenced delivery order. BMS anticipates making payments for months one (1) through ten (10) in SFY 25 and months eleven (11) through twelve (12) in SFY26.

Contract extended service period: 07/22/2024 – 06/14/2025. Funding allocation table below:
CDO BMS24*61
Organizational
Development Project
Phase II

07/22/2024-04/30/2025

05/01/2025-06/14/2025

PR05-2025	Payment	PR07 - 2026	Payment
Lead Project Manager		Lead Project Manager	
65 hours @ \$215	\$64,500.00	10 hours @ \$215	\$12,900.00
Engagement Manager		Engagement Manager 10	
50 hours @ \$270	\$27,000.00	hours @ \$270	\$5,400.00
General Project		General Project	
Manager 549 hours @		Manager 62 hours @	
\$180	\$99,000.00	\$180	\$19,800.00



Project Management		Project Management	
Support Staff 727 hours		Support Staff 125 hours	
@ \$80	\$227,200.00	@ \$80	\$43,840.00
	\$417,700.00		\$81,940.00
	Grand Total:		\$499,640.00

Please feel free to contact me if additional documentation or details are needed. I can be reached at 304-352-4319 or jakendra.burdette@wv.gov. Thank you for your time and consideration in this matter.



- ☐ Any Words ⓘ
- ☐ All Words ⓘ
- ☐ Exact Phrase ⓘ

e.g. 123456789, Smith Corp

"BERRY DUNN MCNEIL & PARKER LLC"

x

Classification



Excluded Individual



Excluded Entity



Federal Organizations



Exclusion Type



Exclusion Program



Location



Dates



Reset



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Online Data Services Help

Business Organization Detail

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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	5511 - Management of Companies and Enterprises - Management of Companies and Enterprises - Management of Companies and Enterprises Including Offices of Bank Holding Companies and Other Holding Companies		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	SETH E. WEBBER 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 Date
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	
2024	
2023	
2022	
2021	
2020	
2019	
2018	
2017	
2016	
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2012	
2011	
2010	
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Date filed	

For more information, please contact the Secretary of State's Office at 304-558-8000.

Tuesday, July 2, 2024 — 10:08 AM

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