



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: 03-25-2025

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 BMS2500000031 1	Change Order No:	Procurement Folder:	1655837
Document Name:	WV Rise Procurement Assistance Project	Reason for Modification:		
Document Description:	WV Rise Procurement Assistance Project			
Procurement Type:	Central Delivery Order			
Buyer Name:	Crystal G Hustead			
Telephone:	(304) 558-2402			
Email:	crystal.g.hustead@wv.gov			
Shipping Method:	Best Way	Master Agreement Number: CMA 0511 HHR2100000003 1		
Free on Board:	FOB Dest, Freight Prepaid			

VENDOR	DEPARTMENT CONTACT																				
Vendor Customer Code: 000000100150 BERRY DUNN MCNEIL & PARKER LLC 2211 CONGRESS ST  PORTLAND ME 04102 US Vendor Contact Phone: 6813138905 Extension:  Discount Details: <table><thead><tr><th></th><th>Discount Allowed</th><th>Discount Percentage</th><th>Discount Days</th></tr></thead><tbody><tr><td>#1</td><td>No</td><td>0.0000</td><td>0</td></tr><tr><td>#2</td><td>No</td><td></td><td></td></tr><tr><td>#3</td><td>No</td><td></td><td></td></tr><tr><td>#4</td><td>No</td><td></td><td></td></tr></tbody></table>		Discount Allowed	Discount Percentage	Discount Days	#1	No	0.0000	0	#2	No			#3	No			#4	No			Requestor Name: Lakendra R Burdette Requestor Phone: 304-352-4319 Requestor Email: lakendra.burdette@wv.gov  <b>2025</b> 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

Purchasing Division's File Copy

Total Order Amount: \$687,505.00

CH 4/7/25  
PURCHASING DIVISION AUTHORIZATION  
DATE: 4/7/2025  
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION  
DATE: 4/7/25  
ELECTRONIC SIGNATURE ON FILE

**Extended Description:**

West Virginia Resource Integration Solutions for Enrollees (WV Rise) Procurement Assistance Project

Dates of Service: 04/01/2025 - 06/14/2025

Total: \$687,505.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$26,875.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2025-04-01	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

125 hours @ \$215 = \$26,875.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$20,250.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2025-04-01	2025-06-14				

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

Engagement Manager: Optional Year One

Hourly Rate: \$270.00

75 hours @ \$270 = \$20,250.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$20,500.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2025-04-01	2025-06-14				

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

Lead MMIS Project Manager: Optional Renewal Year One

Hourly Rate: \$205.00

100 hours @ \$205 = \$20,500.00



Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$535,320.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2025-04-01	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  
2,974 hours @ \$180 =\$535,320.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
5	80101600	0.00000		\$0.0000	\$84,560.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2025-04-01	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  
1,057 hours @ \$80 = \$84,560.00





CDO Bms 25x31



March 10, 2025

To Whom It May Concern:

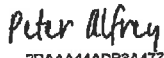
Berry, Dunn, McNeil & Parker, LLC (BerryDunn) submitted a Staffing Plan and Scope of Work (SOW) document to assist the West Virginia Department of Human Services, Bureau for Medical Services by providing support for the West Virginia Resource Integration Solutions for Enrollees (WV RISE) Procurement Assistance Project under our master contract (CMA HHR21\*03). The Medicaid & Children's Health Insurance Program Enterprise System Procurement Assistance Project, Phase II ended January 31, 2025. As stated in the SOW document, the duration of this work is estimated to be three (3) months. BerryDunn agrees to a SOW start date effective April 1, 2025.

Assuming a start date of April 1, 2025, 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  
Berry, Dunn, McNeil & Parker, LLC  
207-541-2242

Ok  


BerryDunn is the brand name under which Berry, Dunn, McNeil & Parker, LLC and BDMP Assurance, LLP, independently owned entities, provide services. Berry, Dunn, McNeil & Parker, LLC provides tax, advisory, and consulting services. BDMP Assurance, LLP, a licensed CPA firm, provides attest services.



# West Virginia Department of Human Services, Bureau for Medical Services

## West Virginia Resource Integration Solutions for Enrollees (WV RISE) Procurement Assistance Project

### Staffing Plan and Scope of Work

Prepared for Centralized Master Agreement HHR 21\*03



#### Submitted by:

Berry, Dunn, McNeil & Parker, LLC  
300 Capitol Street  
Charleston, WV 25301  
681-313-8905

**Nicole Becnel, PMP®, Principal**  
Berry, Dunn, McNeil & Parker, LLC  
nbecnel@berrydunn.com

**Peter Alfrey, PMP®, Principal**  
Berry, Dunn, McNeil & Parker, LLC  
palfrey@berrydunn.com

#### Submitted On:

March 10, 2025



## **Staffing Plan and Scope of Work for the West Virginia Department of Human Services Bureau for Medical Services West Virginia Resource Integration Solutions for Enrollees Procurement Assistance Project**

This scope of work (SOW) describes the tasks Berry, Dunn, McNeil & Parker, LLC (BerryDunn) will perform to assist the West Virginia (State, WV) Department of Human Services (DoHS) Bureau for Medical Services (BMS) with the West Virginia Resource Integration Solution for Enrollees (WV RISE) Procurement Assistance project (hereinafter “WV RISE Project”). The work completed under the WV RISE Project will be completed in accordance with the terms and conditions of the Centralized Master Agreement (CMA) HHR 21\*03 BMS Project Management Services contract between BerryDunn and BMS.

### **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 will support BMS with drafting State outcomes and metrics, solution specifications, and requirements for an outcomes-based request for proposals (RFP). Through this RFP, BMS aims to obtain competitive proposals—in accordance with technical and cost-evaluation criteria—to modernize its WV Medicaid and Children’s Health Insurance Program (CHIP) Modular Medicaid Management Information System (MMIS). The system will consist of the following five modules:

- Provider Management
- Member Management
- Customer Service (call center and member/provider portal)
- Core (claims and financial)
- Pharmacy

The modules will be implemented separately through a phased implementation plan built upon objectives to drive an outcomes-based procurement.

#### **1.1 Key Information**

The objective of this project is to provide project management services and support to BMS for procurement assistance activities, including the development of a modernized outcomes-based WV RISE RFP. This SOW will support the following activities:

- Continue coordinating joint requirements planning (JRP) sessions to confirm State outcomes and metrics, specifications, and requirements for the modernized WV RISE and inform the development of an outcomes-based draft RFP
- Continue creating evaluation, scoring, and training documentation to aid BMS staff in evaluating vendor responses



- Maintain current schedules and timelines for activities required to develop the draft RFP, including service level agreements (SLAs), deliverable dictionary, procurement library, detailed specification and requirement documents, and State outcomes and metrics.
- Create Implementation Advance Planning Document (IAPD) for submission to the Centers for Medicare & Medicaid Services (CMS) to help fund implementation costs for the modernized WV RISE
- Plan organizational transformation through integration of the WV RISE Project with current and future organization development (OD) projects

The WV RISE Project will also help the State meet MITA-specific goals, such as the following:

- General (Gen) 1.0 GOAL – Improve BMS’ effectiveness and efficiency
- Gen 2.0 GOAL – Minimize risk and maximize value from contracted services and products
- Gen 3.0 GOAL – Leverage technology to enhance performance and decision-making
- Gen 4.0 GOAL – Assess, implement, and monitor compliance with all relevant federal laws and regulations (e.g., Patient Protection and Affordable Care Act [PPACA], State Medicaid Manual, Health Insurance Portability and Accountability Act [HIPAA])
- Gen 5.0 GOAL – Ensure program quality
- Gen 6.0 GOAL – Enhance and improve the efficiency, effectiveness, and meaningfulness of outreach and communication
- Business Relationship Management (BR) 1.0 GOAL - Enhance the security, timeliness, and accuracy of data exchanged with authorized and authenticated business partners
- Care Management (CM) 1.0 GOAL – Improve healthcare outcomes for members
- Contractor Management (CO) 1.0 GOAL – Enhance BMS’ ability to monitor contractor performance against approved measures
- Eligibility and Enrollment Management (EE) 1.0 GOAL - Improve interoperability for Eligibility and Enrollment Management
- Financial Management (FM) 1.0 GOAL - Improve access to information necessary for Financial Management
- Operations Management (OM) 1.0 GOAL – Improve operational efficiency and reduce costs in the healthcare system
- OM 3.0 GOAL – Improve provider access to real-time data
- Performance Management (PE) 1.0 GOAL – Improve effectiveness and efficiency of the Performance Management function



- Plan Management (PL) 1.0 GOAL - Enhance BMS' ability to analyze the effectiveness of potential and existing benefits/policies
- PL 2.0 GOAL - Improve consistency of Plan Management processes and effective communication of policy
- Provider Management (PM) 1.0 GOAL - Simplify process for submission of provider information.

## 1.2 Assumptions

Estimates for this SOW are based on the following assumptions:

- 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.
- The State leadership team will consist of Sarah Young, BMS Deputy Commissioner of Policy and Operations, as the BMS project sponsor and Brandon Lewis, BMS Director, Office of Enterprise Systems, as the BMS project lead.
- The BerryDunn leadership team will consist of Nicole Becnel as the engagement manager (EM), Dawn Webb as the lead project manager (LPM), Emily McCoy as the lead MMIS project manager (LMPM), Crystal Fox as the project manager (PM), and Rick Hayward as the deputy PM. Peter Alfrey will provide project oversight.
- The State project lead will provide timely decision-making and responses to information requests from the BerryDunn project team.
- State staff with the required knowledge base to support the WV RISE Project will attend project-related meetings, including JRP sessions. If these individuals are unavailable or do not participate in the JRP sessions, the project schedule, scope, and cost might be impacted.
- All project documents—including meeting notes, action items, issues, risks, and decisions—will be stored in an agreed-upon SharePoint location and will be brought to the attention of Sarah Young, the project sponsor.
- Deliverables will be provided in an agreed-upon format.
- This work will begin upon approval of this SOW—at a mutually agreed-upon date—and is projected to continue for three months.

## 1.3 Project Funding

The State intends to use the MMIS IAPD for this SOW. CMS previously approved the MMIS IAPD on November 22, 2024, for total state and federal funds in the amount of \$85,321,700, under project identifier WV-2024-10-01-MMIS-IAPDU-MITA. The estimated cost of the services delivered under this SOW is \$687,505 (included in the approved Advance Planning Document [APD]). Therefore, any



additional scope added to the services provided under this SOW may require the State to update its MMIS IAPD to allocate additional funds for project management.

## 2.0 Project Scope and Staffing Plan

Table 1 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><b>Engagement Oversight</b></p> <p><i>Service Approach</i></p> <p>BerryDunn's leadership team will provide oversight and coordination of BerryDunn staff, services, and deliverables.</p> <p>BerryDunn's project leadership will meet regularly with the BerryDunn project lead and other key team members to discuss project status and issues impacting the timely completion of project work, and oversee BerryDunn staff, services, and deliverable review.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> <li>• D01: Commissioner Briefing</li> </ul> <p><i>Completion Criteria</i></p> <p>All parties will deem Engagement Oversight complete upon project completion and acceptance of Deliverable D07: Project Closeout Summary by the BMS project sponsor or their designee.</p>	<p>Nicole Becnel</p> <p>Eduardo "Ed" Daranyi</p> <p>Peter Alfrey</p> <p>Emily McCoy</p> <p>Dawn Webb</p>	130
2.0	<p><b>Project Execution and Control</b></p> <p><i>Service Approach</i></p> <p>BerryDunn will provide project management services and support for procurement assistance, including the development of a modernized outcomes-based WV RISE RFP. In support of Project Execution and Control, BerryDunn's leadership will meet regularly with the BMS project sponsor to discuss project status and issues affecting the timely completion of work, and will oversee BerryDunn staff, services, and deliverables.</p> <p>Project Execution and Control will also include:</p> <ul style="list-style-type: none"> <li>• Facilitating meetings, preparing meeting</li> </ul>	<p>Dawn Webb</p> <p>Meghann Slaven</p> <p>Crystal Fox</p> <p>Rick Hayward</p> <p>Mary Stewart</p> <p>Julie DuPuis</p> <p>Alison Barnett</p> <p>Jon Watkins</p> <p>MaryLou Banker</p> <p>Marnie Hudson</p> <p>Hope Connard</p>	1,603



Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>materials, and taking notes for BerryDunn-, State-, and vendor-owned meetings as needed</p> <ul style="list-style-type: none"> <li>Preparing monthly project status updates, risks, issues, and briefings for the State leadership team</li> <li>Managing project logs (action item, decision, issue, and risk tracking)</li> <li>Storing project documentation in an agreed-upon SharePoint location</li> <li>Maintaining the previously prepared Implementation Timeline, including the work plan and modular implementation approach for the modernized WV RISE for use in the procurement schedule</li> </ul> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> <li>D02: Monthly Status Report</li> <li>D03: Project Schedule</li> </ul> <p><i>Completion Criteria</i></p> <p>All parties will deem Project Execution and Control complete upon project completion and acceptance of Deliverable D07: Project Closeout Summary by the project sponsor or their designee.</p>	<p>Matt Oatten AJ Mong Shandia Benke Kortney Ester Kourtney Kirk Cate Poling Sam Kessler Hailey Holden Alycia Minshall Caitlin Cabral Carole Ann Guay Jonathan "Jon" Williams Jordan Ramsey Megan Hamilton KD Dobyne Grace Min</p>	
3.0	<p><b>Procurement Advisory Services</b></p> <p><i>Service Approach</i></p> <p>Using the previously prepared WV RISE Strategic Plan, BerryDunn will provide procurement advisory services to support activities surrounding the procurement(s) of WV RISE modules.</p> <p>During the procurement advisory services phase, BerryDunn will conduct the following activities:</p> <ul style="list-style-type: none"> <li>Continue creating evaluation, scoring, and training documentation to aid BMS staff in evaluating vendor responses</li> <li>Maintain the procurement schedule and related deliverables (as needed)</li> <li>Update the WV RISE Strategic Plan (as needed)</li> </ul> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> <li>D04: Procurement Schedule (as needed)</li> <li>D05: Updated Strategic Plan (as needed)</li> </ul>	<p>Dawn Webb Crystal Fox Rick Hayward Shea Berry-Brennan Brandon Milton Katie Lauwers Marvin "Ed" Crawford Mary Stewart Jim Strassenburgh Jeff Stoddard Julie DuPuis Alison Barnett MaryLou Banker Liz Vose Marnie Hudson</p>	509





Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p><b>Completion Criteria</b></p> <p>All parties will deem Procurement Advisory Services complete upon project completion and acceptance of Deliverable D07: Project Closeout Summary by the project sponsor or their designee.</p>	<p>Jon Watkins Matt Oatten AJ Mong</p>	
4.0	<p><b>RFP Development Services</b></p> <p><b>Service Approach</b></p> <p>BerryDunn will support the State in the development of a modernized outcomes-based RFP to solicit competitive proposals and meet solution outcomes, specifications, and requirements according to technical and cost-evaluation criteria.</p> <p>RFP Development Services includes the following activities:</p> <ul style="list-style-type: none"> <li>• Prepare for JRP sessions by researching requirements specific to the proposed modules to confirm specifications and requirements for the modernized WV RISE and to inform the development of the draft RFP</li> <li>• Facilitate internal requirements sessions with BerryDunn team members who have experience with current BMS policies and Medicaid Enterprise Systems (MES) as well as documenting the as-is and to-be state of the current enterprise, including the inventory, review, and analysis of current reports, interfaces, and policy manuals to identify necessary updates</li> <li>• Support the State with development of SLAs, deliverable dictionary, procurement library, and State outcomes and metrics</li> <li>• Engage the USVI, under the guidance of BMS, in procurement planning activities such as soliciting requirements to fit USVI needs; providing requirements for review and approval; including requirements in JRP sessions and procurement development; and incorporating USVI feedback into the procurement</li> </ul> <p><b>Completion Criteria</b></p> <p>All parties will deem RFP Development Services complete upon project completion and acceptance of Deliverable D07: Project Closeout Summary by the</p>	<p>Dawn Webb Crystal Fox Rick Hayward Shea Berry-Brennan Kortney Ester Brandon Milton Katie Lauwers Marvin "Ed" Crawford Mary Stewart Jim Strassenburgh Jeff Stoddard Julie DuPuis Alison Barnett MaryLou Banker Liz Vose Marnie Hudson Jon Watkins Matt Oatten AJ Mong</p>	1,570



Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	project sponsor or their designee.		
5.0	<p><b>IAPD Support</b></p> <p><i>Service Approach</i></p> <p>BerryDunn will develop and help facilitate the approval of APDs to help ensure the project continues to maintain buy-in and financial backing from relevant federal partners.</p> <p><i>Deliverable</i></p> <ul style="list-style-type: none"> <li>D06: IAPD</li> </ul> <p><i>Completion Criteria</i></p> <p>All parties will deem IAPD Support complete upon project completion and acceptance of Deliverable D07: Project Closeout Summary by the project sponsor or their designee.</p>	<p>Dawn Webb</p> <p>Crystal Fox</p> <p>Rick Hayward</p> <p>Mary Stewart</p> <p>MaryLou Banker</p> <p>Marnie Hudson</p> <p>Dawn Webb</p> <p>AJ Mong</p> <p>Jon Watkins</p>	476
6.0	<p><b>Project Closeout</b></p> <p><i>Service Approach</i></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"> <li>D07: Project Closeout Summary</li> </ul> <p><i>Completion Criteria</i></p> <p>All parties will deem Project Closeout complete upon project completion and acceptance of Deliverable D07: Project Closeout Summary by the project sponsor or their designee.</p>	<p>Peter Alfrey</p> <p>Crystal Fox</p> <p>Rick Hayward</p> <p>Matt Oatten</p>	43
<b>Total Hours</b>			<b>4,331</b>
<b>Total Not-To-Exceed Cost Estimate</b>			<b>\$687,505</b>



### 3.0 Project Resources and Hours

Table 2 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 HHR 21\*03.

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

- CL 9: EM (\$270/hour)
- CL 8: LPM (\$215/hour)
- CL 10: LMPM (\$205/hour)
- CL 11: General Project Manager (GPM) (\$180/hour)
- CL 12: Project Management Support Staff (SS) (\$80/hour)

**Table 2: Project Resources Estimated Hours and Total Cost**

CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
9	EM	\$270	Nicole Becnel	75	\$20,250
8	LPM	\$215	Dawn Webb	125	\$26,875
10	LMPM	\$205	Emily McCoy	100	\$20,500
11	GPM	\$180	Peter Alfrey	100	\$18,000
11	GPM	\$180	Meghann Slaven	125	\$22,500
11	GPM	\$180	Crystal Fox	407	\$73,260
11	GPM	\$180	Eduardo "Ed" Daranyi	14	\$2,520
11	GPM	\$180	Rick Hayward	407	\$73,260
11	GPM	\$180	Liz Vose	300	\$54,000
11	GPM	\$180	Mary Stewart	407	\$73,260
11	GPM	\$180	MaryLou Banker	406	\$73,080
11	GPM	\$180	Alison Barnett	250	\$45,000
11	GPM	\$180	Marnie Hudson	206	\$37,080
11	GPM	\$180	Shea Berry-Brennan	10	\$1,800
11	GPM	\$180	Brandon Milton	10	\$1,800
11	GPM	\$180	Julie Dupuis	56	\$10,080
11	GPM	\$180	Katie Lauwers	10	\$1,800
11	GPM	\$180	Jeff Stoddard	20	\$3,600
11	GPM	\$180	Jim Strassenburgh	20	\$3,600
11	GPM	\$180	Marvin "Ed" Crawford	20	\$3,600
11	GPM	\$180	Kortney Ester	206	\$37,080
12	SS	\$80	Matt Oatten	300	\$24,000
12	SS	\$80	AJ Mong	295	\$23,600



CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
12	SS	\$80	Jon Watkins	295	\$23,600
12	SS	\$80	Hailey Holden	14	\$1,120
12	SS	\$80	Cate Poling	20	\$1,600
12	SS	\$80	Kourtney Kirk	10	\$800
12	SS	\$80	Shandia Benke	20	\$1,600
12	SS	\$80	Alycia Minshall	10	\$800
12	SS	\$80	Sam Kessler	10	\$800
12	SS	\$80	Caitlin Cabral	10	\$800
12	SS	\$80	Carole Ann Guay	10	\$800
12	SS	\$80	Jonathan "Jon" Williams	10	\$800
12	SS	\$80	Jordan Ramsey	10	\$800
12	SS	\$80	KD Dobyne	10	\$800
12	SS	\$80	Megan Hamilton	10	\$800
12	SS	\$80	Grace Min	10	\$800
12	SS	\$80	Hope Connard	13	\$1,040
<b>Total</b>				<b>4,331</b>	<b>\$687,505</b>



## 4.0 Project Hours and Costs Per Month

Table 3 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	LMPM Hours	GPM Hours	SS Hours	Est. Hours Per Month	Est. Cost Per Month
Month 1	30	50	40	1,143	426	1,689	\$266,870
Month 2	30	50	40	1,141	426	1,687	\$266,510
Month 3	15	25	20	690	205	955	\$154,125
<b>Total</b>	<b>75</b>	<b>125</b>	<b>100</b>	<b>2,974</b>	<b>1,057</b>	<b>4,331</b>	<b>\$687,505</b>



# 5.0 High-Level Timeline

Figure 1 illustrates the proposed high-level timeline for planning activities.

Figure 1: Proposed High-Level Timeline

Task	Month		
	1	2	3
1.0 Engagement Oversight			
2.0 Project Execution and Control			
3.0 Procurement Advisory Services			
4.0 RFP Development Services			
5.0 IAPD Support			
6.0 Project Closeout			



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**Berry, Dunn, McNeil & Parker, LLC Authorized Signature**

As a principal of this firm in our Consulting Team, I have reviewed this SOW and am legally authorized to commit Berry, Dunn, McNeil & Parker, LLC to the work as described herein. The work and level of effort is a not-to-exceed cost. Work to be invoiced to BMS 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*  
2DAAA44ADE3A477

Signature

3/10/2025

Date

**Bureau for Medical Services Approval of Approach, Staffing, and Not-to-Exceed Cost**

*Brenda Lewis*

Signature

3/25/25

Date



## Appendix A: Resumes



### Nicole Becnel, PMP®, ECCP

PRINCIPAL

Berry, Dunn, McNeil & Parker, LLC

#### EDUCATION AND CERTIFICATIONS

BA, Speech and Hearing Science, University of South Florida

Project Management Institute (PMI) Certified Project Management Professional® (PMP®)

Executive Coaching Certification®

#### PROPOSED PROJECT ROLE

Engagement Manager

#### MEDICAID EXPERIENCE

22 Years

Nicole Becnel has steered a career track for over 22 years leading to her current role as Principal at BerryDunn. Throughout her career, she has consistently demonstrated a deep grasp of processes, policies, analysis, and industry knowledge, earning a brand of an influential leader whose distinction interlaces a broader view of business needs to connect the dots between people, data, technology, and business strategy. This unique strength has enabled a different and fresh perspective in building and leading a Medicaid practice – reaching beyond the traditional role to help clients deliver transformations in their Health and Human Services programs. Nicole delivers results with a passion for building and motivating top-performing teams. The combination of Nicole's experience, drive, business savvy, and emotional intelligence has influenced her transformational leadership style. She has shaped a credible executive presence and is credited with playing an instrumental role in BerryDunn's evolution to its now prominent standing as a national leader in the Health and Human Services industry.

#### KEY QUALIFICATIONS

- 22 years' Health and Human Services portfolio, program, and project management experience for State Medicaid and other HHS agencies.
- Large-scale IT and Medicaid Enterprise technical implementation and certification experience.
- Currently leading the West Virginia project management team to support the State with the implementation, one of the first in the nation, of a fully integrated eligibility and enrollment solution.
- Proven project management track record of over 100 short and long-term projects delivered on time and within budget.
- Led the West Virginia project management team, who became one of the first in the nation to help the State successfully implement a Medicaid Management Information System (MMIS) solution in accordance with the project's schedule and budgets, without issuing advanced payments to providers.





- Partnered with West Virginia Medicaid leadership to initiate a multi-state collaborative where states can collaborate, share information, and brainstorm solutions. Nicole leads the project team that has supported West Virginia with this initiative. Since its inception, West Virginia has increased membership to 14 state partners that participate monthly.
- Led the project team that supported the State to secure over \$750 million federal dollars for West Virginia's transformation initiatives for their state programs.
- Certified Project Management Professional®
- Executive Coaching Certified Professional®
- Private Sector Technology Group (PSTG) Past Vice-Chair

## RELEVANT EXPERIENCE

### **BerryDunn (06/2010 to 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:

#### **– West Virginia Bureau for Medical Services Engagement Manager (2012 to Present)**

Nicole serves as the Engagement Manager for an extensive portfolio of projects supporting the State of West Virginia. Nicole provides strategic guidance, and engagement oversight to many West Virginia Projects including, but not limited to the following projects:

- *MMIS PERM Phase II (05/2020 to 05/2021)*
- *SUD Waiver Initiative Phase 4 (04/2020 to 05/2021)*
- *State Plan Review and Support (SPRS) (02/2020 to 05/2021)*
- *Technical Assistance and Program Support (TAPS): Phase 2 (11/2019 to 04/2021)*
- *Access to Care Project Monitoring Phase (03/2017 to 04/2021)*
- *MCO Transition: Phase II (03/2020 to 02/2021)*
- *MCO ORR Assistance (09/2020 to 12/2020)*
- *MMIS Fee Schedule and Edit Quality Review Project: Phase III (06/2020 to 11/2020)*
- *Enterprise Program Management Office (EPMO) (11/2018 to 10/2020)*
- *MHT MCO Procurement Assistance Project: Phase II (05/2020 to 09/2020)*
- *MHP Implementation (Coordinated Care Management) (03/2020 to 06/2020)*
- *Children with Serious Emotional Disorder Waiver (CSEDW) Initiative: Phase II (10/2019 to 05/2020)*
- *MMIS Fee Schedule and Edit Quality Review Phase II (01/2019 to 04/2020)*
- *SUD Waiver Initiative: Phase III (03/2019 to 03/2020)*
- *Coordinated Care Management Transition Project Management and Procurement Assistance (02/2019 to 01/2020)*
- *EVV Solution Implementation (06/2018 to 12/2019)*
- *TAPS (11/2018 to 10/2019)*



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

– **WV Department of Human Services (DoHS)**  
**APD Assistance (07/2020 to 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.



*Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (07/2020 to Present)*

Nicole is the Lead Project Manager for the EDQ Assistance Project to support initiatives to optimize MCO encounter data processes for BMS's risk-based managed care programs. Nicole leads the project team that is assisting the State with the retirement of a historical file submission process between the MCOs and the Data Warehouse/Decision Support Solution (DW/DSS) vendor and 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.

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

*Electronic Visit Verification (EVV) Solution Implementation Project (03/2018 to 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.

*Provider Management Support (07/2019 to 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.

*West Virginia Children's Health Insurance Program (WVCHIP) Operational Readiness Review (12/2019 to 10/2020)*

Nicole was the Lead Project Manager overseeing the State's transition of the WVCHIP program from fee-for-service (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.

*COVID-19 Contact Tracing and Testing Initiative (04/2020 to 09/2020)*

Nicole led the team that assisted the State with the response to the COVID-19 public health emergency. She supported the 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 Trust (MHT) MCO Procurement Assistance Phase I and Phase II Projects (07/2019 to 09/2020)*

Nicole was the Lead Project Manager overseeing BerryDunn's procurement assistance and project management support for managed care and readiness review services for the MHT program, the State's risk-based managed care program. The team assisted in population expansion under the current comprehensive MCO contract to add 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.

*Mountain Health Promise (MHP) Implementation Project Management Support (03/2020 to 06/2020)*

Nicole was the Lead Project Manager overseeing the team, assisting the State 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.

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

Nicole was the Lead Project Manager for BMS's MITA SS-A efforts, including the annual maintenance of SS-A activities and Data Management Strategy (DMS). She leads the organization development planning to support WV's MITA maturity and modernization efforts. The team is creating a 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.

*Substance Use Disorder (SUD) Waiver Initiative Project (07/2016 to 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.

*Project Management of MMIS Procurement, DDI, and Certification (12/2012 to 09/2013)*  
Nicole served as a project manager for the DDI of the Molina HealthPAS MMIS. Her work on the project included oversight of contract start-up activities and system design sessions.

*5010 Refresh Project (10/2011 to 08/2013)*  
Nicole served as project manager for the successful implementation of the 5010/D.O 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.O. 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.

*Provider Enrollment (PEA) Project (07/2011 to 12/2012)*  
Nicole supported the Bureau with her project, program and portfolio management, and subject matter expertise as 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.

*Data Warehouse / Decision Support System (DW/DSS) Project Management (06/2010 to 06/2011)*  
Nicole served as the project manager to assist the State with the development of procurement documentation for the DW/DSS re-procurement. In this role, Nicole was responsible for managing the project team, serving as liaison with the Bureau, reviewing project deliverables, and providing subject matter knowledge and support.

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

*MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 01/2018)*  
As Engagement Manager, Nicole oversaw the BerryDunn team working in collaboration with the New Jersey Implementation Team Organization (ITO) for the Replacement MMIS (R-MMIS). In her role, she was responsible for the oversight of the Leverage and Reuse, Testing, and Certification project activities.

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

**– Project Manager for MIHMS Provider Enrollment**

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

**– 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



## **Dawn Webb, PMP®, CPC, COC, Prosci® CCP, LSSGB**

**MANAGER**

Berry, Dunn, McNeil & Parker, LLC



### **EDUCATION AND CERTIFICATIONS**

BS, Healthcare  
Leadership, Wheeling  
Jesuit University

AAS, Office  
Administration, West  
Virginia University at  
Parkersburg

Project Management  
Institute (PMI) Certified  
Project Management  
Professional® (PMP®)

Certified Professional  
Coder (CPC), American  
Academy of Professional  
Coders

Certified Outpatient Coder  
(COC), American Academy  
of Professional Coders

Prosci® Certified Change  
Practitioner

Lean Six Sigma Green  
Belt Certification (LSSGB)

### **PROPOSED PROJECT ROLE**

Lead Project Manager

### **MEDICAID EXPERIENCE**

12 Years



Dawn is a manager in BerryDunn's Medicaid Practice Group (MPG), providing leadership and project management to West Virginia's (WV'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 nine years of experience in MMIS, state Medicaid programs and policies, and requests for federal funding, such as the development of Advance Planning Documents (APDs). Dawn's 15 years of project management experience, coupled with her certifications as a Certified Professional Coder, a Certified Outpatient Coder, and a Prosci® Certified Change Practitioner, provides a unique perspective to clients across the Medicaid enterprise.

### **KEY QUALIFICATIONS**

- 30 years of experience in Current Procedural Terminology (CPT) coding, Current Dental Terminology (CDT), Healthcare Common Procedure Coding System (HCPCS) coding, Internal Classification of Diseases, Ninth Revision (ICD-9) coding, ICD, Tenth Revision (ICD-10), Diagnosis Related Grouping (DRG) calculations, National Correct Coding Initiative (NCCI) editing, and Electronic Data Interchange (EDI) transactions
- 30 years of experience applying medical and dental coding reimbursement methodologies
- 15 years of project management experience for government and private entities
- 12 years of experience working within WV's MMIS, including system configuration, system analysis, and MMIS configuration validation against Medicaid policies
- Seven years of experience leading and supporting West Virginia Payment Error Rate Measurement (PERM) cycles
- 12 years of experience analyzing the MMIS for potential cost savings



## RELEVANT EXPERIENCE

### **BerryDunn (08/2017 to Present)**

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

#### **– Detroit Wayne Integrated Health Network (DWIHN)**

##### *Medicaid Billing Auditing Services (10/2024 to Present)*

Dawn serves as an engagement manager overseeing the auditing services of DWIHN's Medicaid claims. She coordinates BerryDunn resources to help ensure work is completed in an efficient manner as well as coordinating the auditing activities with DWIHN leadership.

#### **– West Virginia Bureau for Medical Services (BMS)**

##### *Client & Engagement Operations Program Manager (01/2024 to 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 provides project oversight for the following projects:

##### *Partnership Management Support (12/2023 to 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 to Present)*

Dawn currently manages the BerryDunn team for the WV Engagement, providing support with facilitating the development and approval of APDs for the WV 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 and annual and as-needed updates to 10 established APDs.

##### *Quality Improvement Initiatives Portfolio Manager (05/2019 to Present)*

As quality improvement initiatives portfolio manager, Dawn provided 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:

- Information Technology Control Environment Review Project (07/2024 to Present)
- Certified Community Behavioral Health Clinic Development and Implementation (06/2024 to Present)
- System Development Life Cycle (SDLC) (06/2024 to Present)
- Medicaid & Children's Health Insurance Program Enterprise System Procurement Assistance (04/2024 to Present)
- Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (07/2021 to Present)
- State Plan Review and Support (SPRS) (02/2020 to Present)
- MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (05/2019 to Present)
- Substance Use Disorder (SUD) Waiver Initiative Project (07/2017 to Present)





- Public Health Emergency (PHE) Support (12/2021 to 12/2024)
- Data Improvement Project (09/2019 to 06/2024)
- Provider Management Support (11/2019 to 10/2023)
- Third-Party Liability (TPL) Procurement (05/2019 to 03/2022)
- Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (08/2020 to 02/2022)

*PERM Project (05/2018 to 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 to 04/2023)*

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.

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

*Recovery Audit Contractor (RAC) (09/2023 to 01/2025)*

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 to 10/2024)*

Dawn supports USVI with the development and approval of APDs to support key program initiatives. Dawn also 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 to 06/2022)*

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

– **Alaska Division of Legislative Audit (DLA)**

*NCCI Compliance Evaluation (07/2019 to 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 that the Alaska MMIS complies with the NCCI technical guidelines.

**Valley Health Systems, Inc. (12/2009 to 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 to 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 to 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 to 06/2004)**

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

**Garnet Career Center (02/1999 to 01/2000)**

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

**University Health Associates (09/1996 to 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 to 05/1996)**

Dawn began her career as a medical claims examiner.

**PUBLICATIONS AND PRESENTATIONS**

- *Keeping the PERM Manual Update in focus during the PHE*, a BerryDunn blog, September 2020



## Emily E. McCoy, RN, BSN, PMP®

SENIOR MANAGER

Berry, Dunn, McNeil & Parker, LLC

### EDUCATION AND CERTIFICATIONS

BS, Nursing, Marshall University

Registered Nurse

Project Management Institute (PMI) Certified Project Management Professional® (PMP®)

Executive Coaching Certification

### PROPOSED PROJECT ROLE

Lead MMIS Project Manager

### MEDICAID EXPERIENCE

22 years

Emily McCoy is an experienced project manager and registered nurse with deep expertise in healthcare consulting, including long-term care (LTC) and Medicaid/Medicaid Management Information Systems (MMIS). Her clinical experience includes direct care for individuals requiring skilled and LTC services, inpatient behavioral health services, and neurological care. Emily also has over 25 years of combined program management, project management, and leadership experience for both private and public sectors, including hospitals and state health and human services (HHS) agencies, of which over 13 years was spent working in Medicaid and MMIS as an employee of the West Virginia (WV) Department of Human Services (DoHS).

### KEY QUALIFICATIONS

- More than 13 years supporting and leading Medicaid projects within the WV MMIS, with the last two and a half years as the WV Director of MMIS Operations
- More than four years supporting and leading Medicaid policy for LTC, Pre-Admission Screening and Resident Review (PASRR), hospice, and home health programs as an employee of WV DoHS's Bureau for Medical Services (BMS)
- Over two years of experience leading the Transformed Medicaid Statistical Information System (T-MSIS) efforts as the WV state representative, working in collaboration with the Centers for Medicare & Medicaid Services (CMS), various technical assistance groups (TAG), and the MMIS vendor
- Design, development, and implementation (DDI) experience with four large-scale MMIS implementations, in various roles, such as LTC subject matter expert (SME), User Acceptance Testing (UAT) Lead, and Project Manager (WV and New Jersey)
- Nearly three years of project management experience with a large-scale integrated eligibility system in WV, known as People's Access to Help (PATH)
- Over 20 years of experience interacting and collaborating with federal agencies, such as CMS



- Over 15 years of experience with Minimum Data Set (MDS) coordination, including the use of MDS assessments and Resource Utilization Groups (RUGs) in Medicaid rate setting and claims processing.
- Experience leading enterprise-wide portfolio management
- Served on the Outcomes-Based State Self-Assessment (SSA) Workgroup through the Private Sector Technology Group (PSTG)

## RELEVANT EXPERIENCE

### **BerryDunn (07/2016 to Present)**

Emily serves as a senior manager in BerryDunn's Medicaid Practice Group (MPG), bringing her years of experience to state Medicaid agency clients, particularly in the MMIS area. Throughout her role, Emily has provided support to the WV Bureau for Medical Services (BMS), WV's single state Medicaid agency.

#### – WV Department of Health Facilities (DHF)

*Contract Labor Management Services (CLMS) Request for Proposal (RFP) Development (07/2024 to Present)*

#### – WV Department of Human Services (DoHS)

*Portfolio Manager and Deputy Engagement Lead – WV Engagement: Portfolio Management Office (11/2023 to Present)*

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

- *WV Organizational Development Phase II (07/2024 to Present)*
- *Information Technology (IT) Control Environment Review Project (07/2024 to Present)*
- *Enterprise Data Solution (EDS) Implementation and Certification Phase V (06/2024 to Present)*
- *System Development Lifecycle (SDLC) Phase I (06/2024 to Present)*
- *Medicaid and CHIP Enterprise System (MCES) Procurement Assistance Phase II (06/2024 to Present)*
- *Medicaid Information Technology Architecture (MITA) State Self-Assessment (SS-A) 2022 (06/2024 to Present)*
- *Advance Planning Document (APD) Consulting Services Support Phase II (06/2024 to Present)*
- *Partnership Management Project Phase II (06/2024 to Present)*
- *Payment Error Rate Measurement (PERM) Reporting Year (RY) 2026 (06/2024 to Present)*
- *Technical and Program Support (TAPS) Phase VI (06/2024 to Present)*
- *PMO Services for the WV Medicaid People's Access To Help (PATH) Phase III (06/2024 to Present)*
- *Child Welfare Initiatives (CWI) Phase V (06/2024 to Present)*
- *State Plan Review and Support Phase II (06/2024 to Present)*
- *American Rescue Plan (ARP) Home and Community Services (HCBS) Implementation Support Phase II (06/2024 to Present)*
- *Certified Community Behavioral Health Clinic (CCBHC) Program Development and Implementation Phase III (06/2024 to Present)*



- *Children with Serious Emotional Disorder (CSED) Waiver Phase V (06/2024 to Present)*
- *1115 Demonstration Behavioral Health Project (06/2024 to Present)*
- *Programmatic Managed Care Support (06/2024 to Present)*
- *Justice Involved Program Support Phase I (06/2024 to Present)*
- *Mental Health Parity (MHP) and Behavioral Health Support (BHS) Project Phase III (06/2024 to Present)*
- *Bureau for Public Health Office of Nutrition Services (ONS) PMO for Women, Infants, and Children (WIC) Crossroads User Group (XRUG) Phase III (11/2023 to Present)*
- *EDS Implementation and CMS Certification Project Phase IV (11/2023 to 06/2024)*
- *TAPS Phase V (11/2023 to 06/2024)*

*Eligibility and Enrollment Implementation Assistance (01/2018 to 12/2022)*

Emily was 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 (OCM), and certification and compliance. Emily was able to combine her experience and knowledge of State policy and system implementations with this unique opportunity to integrate three separate systems to improve service delivery to State citizens.

*Public Health Emergency (PHE) (10/2021 to 07/2022)*

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

*Portfolio Coordination and Management (PCM) (11/2020 to 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 to 10/2020)*

Emily served as the project manager for the WV DoHS EPMO project, leading and providing oversight to a team of individuals assisting the State in the establishment of its own PMO. This project focused on leveraging and developing tools, templates, processes, and plans for the State to utilize as they begin to establish the PMO and focus on gaining adoption within the organization. Beginning in March 2020, the EPMO project began identifying projects across WV DoHS that were impacted by the COVID-19 outbreak and started utilizing some of the project artifacts to navigate through project and program management during a public health emergency (PHE). This work included building upon existing vendor relationships with Optum and DXC to apply system modifications to accommodate necessary PHE actions.

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

*MMIS Modernization (07/2022 to 12/2023)*

Emily served as the Engagement Manager for the Project Management Office (PMO) in collaboration with the Implementation Team Office (ITO). The MMIS Modernization was the opportunity for NJ DMAHS, under the Department of Human Services, NJ’s single state Medicaid



agency, to update their monolithic legacy MMIS with a modular approach within the CMS guidelines. Emily led 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 to 01/2018)***

Emily led the BerryDunn Medicaid testing team, in collaboration with the New Jersey Implementation Team Organization (ITO), for the Replacement MMIS (R-MMIS). She applied her WV MMIS testing experience to the implementation of the New Jersey R-MMIS.

**– Henrico County, VA**

***Henrico Area Mental Health and Development Services (HAMHDS) Electronic Health Record (EHR) System Consulting (08/2016 to 04/2017)***

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

**WV Department of Health and Human Services (DHHR) [DoHS], Office of Management Information Services (OMIS) (11/2013 to 06/2016)**

Emily served as the Director of the MMIS for WV with overall duties involving the oversight and management of the MMIS and the contracted Fiscal Agent. In this role, she was responsible for managing several projects that would be integrated into the MMIS. Specific duties as the Director of MMIS included:

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

**WV Bureau for Medical Services (BMS) (01/2003 to 10/2013)**

During her 10 years with BMS, WV's single state Medicaid agency, Emily held multiple positions, as described below.

**– Medicaid Management Information System (MMIS) (01/2007 to 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 to 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 to 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 to 12/2002)**

**– Transitional Care Unit (05/1999 to 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 to 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 to 01/1998)**

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



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

PRINCIPAL

Berry, Dunn, McNeil & Parker, LLC

### EDUCATION AND CERTIFICATIONS

MBA, Organizational  
Management, Husson  
University

MA, History, Providence  
College

BA, Journalism and  
Communication, Spanish  
Minor, University of  
Oregon

Project Management  
Institute (PMI) Certified  
Project Management  
Professional® (PMP®)

LEAN Six Sigma Green  
Belt Certification

Prosci® Certified Change  
Practitioner

### PROPOSED PROJECT ROLE

General Project Manager

### MEDICAID EXPERIENCE

10 years

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

### KEY QUALIFICATIONS

- Certified Project Management Professional® – over 17 years of project management experience
- Over 17 years of healthcare operations experience; 10 years of Medicaid experience
- Over 9 years of government health and human services consulting experience
- Prosci® Certified Change Practitioner
- Certified Six Sigma LEAN professional
- Experience leading Medicaid system implementations, data management initiatives, and program Medicaid enterprise systems implementations in states such as Washington, Maryland, Vermont, New Jersey, and West Virginia





## RELEVANT EXPERIENCE

### **BerryDunn (03/2014 to present)**

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

#### **– West Virginia DoHS, BMS and West Virginia Children's Health Insurance Program (WVCHIP) (09/2018 to present)**

*West Virginia Engagement: BerryDunn Project Management Office*

Peter provides strategic direction for BerryDunn's West Virginia engagement team and for specific DoHS/BMS/WVCHIP projects. Portfolios, programs, and projects include, but are not limited to:

- *Medicaid Enterprise System Modernization Strategy and Procurement—Phase I, II and III (10/2020 to present)*
- *Programmatic Managed Care (06/2024 to present)*
- *Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project Phases I, II, III and IV (09/2019 to present)*
- *Integrated Eligibility Solution (IES)/People's Access to Help (PATH) DDI Project Management (08/2018 to 11/2019 and 06/2023 to present)*
- *Partnership Management (06/2024 to present)*
- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (09/2020 to present)*
- *Substance Use Disorder Waiver Initiative Project (07/2017 to 03/2019, 06/2023 to present)*
- *Mountain Health Trust Phase II (12/2023 to 06/2024)*
- *Incident and Case Management System Procurement Assistance (02/2023 to 06/2024)*
- *Public Health Emergency (PHE) Support (12/2021 to 06/2024)*
- *WVCHIP Out of Pocket Maximum (05/2021 to 06/2022)*
- *Data Improvement Project—Phases I, II, III and IV (09/2019 to 06/2024)*
- *WVCHIP MCO Transition Planning Project Phases I and II (03/2019 to 06/2021)*
- *Mental Health Parity and Behavioral Health Services Support (05/2020 to 09/2022)*
- *Contact Tracing (04/2020 to 09/2022)*
- *Coordinated Care Management Project Management and Procurement Assistance / Mountain Health Promise Implementation Project Management Support and Operational Readiness Review (02/2019 to 06/2020) and MHP Re-Procurement (10/2021 to 09/2022)*
- *Mountain Health Trust MHT MCO Procurement Assistance Project Phases I and II (06/2019 to 06/2021), and Mountain Re-Procurement (03/2020 to 08/2022)*
- *MCO Encounter Data Quality—Phases I and II (06/2020 to 02/2022)*
- *WVCHIP Operational Readiness Review (09/2020 to 01/2021)*
- *Substance Use Disorder Waiver Initiative Project (07/2017 to 03/2019)*



- *Asset Verification System Project Management Services and Procurement Assistance (04/2017 to 02/2018)*
- *Project Management of Medicaid Management Information System (MMIS) Procurement, DDI, and Certification (10/2014 to 12/2016)*

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

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

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

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

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

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

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

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

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

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

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

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

**Martin's Point Health Care (12/2008 to 03/2014)**

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

**Health Dialog (01/2006 to 11/2008)**

As Implementation Project Manager, Peter oversaw operational planning, execution, and reporting of multi-faceted projects for new and existing clients (health plans, large employers, and government care management programs), including BlueCross BlueShield (various regions),



Capital Health Plan, and the Centers for Medicare & Medicaid Services (CMS). He also managed cross-functional implementation teams, maintained communication with clients, set expectations regarding scope, and managed implementation schedules while managing multiple, concurrent implementations. He also served as Project Management Office lead for company's smoking cessation nicotine replacement solution and initiative, overseeing product development work and collaboration with a third-party vendor.

**Ernst & Young (12/2002 to 12/2005)**

As the communications and pursuit strategist, Peter managed internal activity and coordination for strategic new business pursuits that offered tax and audit services to Ernst & Young's existing internal audit clients and managed the Creative Services team on production of all press, client, and internal materials.

**Cisco Systems, Inc. (11/2000 to 04/2001)**

Peter served as the public relations manager for the Customer Contact Business Unit (CCBU)/Internet Communications Software Group (ICSG), during which time he managed CCBU on press and analyst activities, including product launches, customer and partner announcements, and other CCBU-related programs. He also managed a public relations agency in execution of press and analyst activity, creation of written materials, industry event coordination, and all CCBU public relations initiatives. He created product and business unit messaging and positioning, drove CCBU public relations strategy, and worked with Cisco marketing teams, CCBU/ICSG executives, and corporate public relations on all public relations initiatives.

**Text 100 Corporation (01/1998 to 11/2000)**

While working as an account manager, Peter helped to ensure the execution of approved public relations strategic plans and initiatives, as well as core public relations activities. He counseled clients on messaging and positioning, drove account strategy and tactics, including all press and analyst activity, creation of all client materials, industry event coordination, and all client global public relations initiatives, and co-developed all annual and quarterly strategic plans and initiatives.

**Davé and Balrey Communications (03/1997 to 12/1998)**

While working as an account executive/account manager, Peter oversaw the execution of public relations plan activities and initiatives for a technology client base of Netmosphere Inc., Intergraph Computer Systems, eCommerce, and Warp Drive Networks. He developed relationships with top-tier media and analysts through client product launches, customer and partner announcements, and other client initiatives.

**Copithorne and Bellows Public Relations (05/1995 to 03/1997)**

Peter worked as an account coordinator, where he supported day-to-day account administration, provision of information for the collation of reports for client base of Hewlett-Packard Company (corporate desktop and notebook PCs), and EIZO Nanao Technologies.

**PUBLICATIONS AND PRESENTATIONS**

- Facilitator: Session, *Organization Excellence: A Key Ingredient for a Successful Effort to Modernize the Medicaid Enterprise*, representatives from Iowa and West Virginia, New England States Consortium System Organization (NESCSO) Medicaid Enterprise Systems Conference (MESC), Louisville, Kentucky, 08/2024



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- Session abstract, *Transforming Systems, Culture and Operations to Support Your Medicaid Enterprise* selected by NESCSO MESC in Denver, Colorado, featuring representatives from Hawai'i, New Jersey, Oregon, and West Virginia (08/2023)
  - Facilitator, Workshop: *Outcomes Based Certification*, MESC, Boston, Massachusetts, 08/2021
  - The 2020 *Final Rule—Understanding new flexibilities to control costs and deliver care*, a BerryDunn blog, 11/2020
  - Podcast, *Medicaid and Children's Insurance Program (CHIP) Managed Care Monitoring and Oversight Tools*, 11/2020
  - Podcast, *Resumption of Normal Operations: PHE Considerations for States*, 09/2020
  - *COVID-19 and Opportunities to Reboot Managed Care*, a BerryDunn blog, 09/2020
  - *The Case for Data Governance in the Modular Medicaid Enterprise*, a BerryDunn blog, MESC, 09/2016
  - Session abstract, *State Roundtable on Section 1115: Substance Use Disorder (SUD) Demonstrations; Updates from states who are implementing Section 1115 Waivers to combat the opioid crisis. Focus on opportunities and challenges in each state, opportunities for partnership and collaboration, leverage and reuse* selected by NESCSO organizers for the MESC conference in Portland, Oregon, featuring representatives from West Virginia, Virginia, and Massachusetts, 09/2016
  - *Innovation in a Digital Era: Using Data to Pivot to "the New"* presentation for MESC 2016, co-presented with a BerryDunn colleague and professionals from Accenture plc (Accenture), 09/2016.



## Meghann Slaven

MANAGER

Berry, Dunn, McNeil & Parker, LLC



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

### EDUCATION AND CERTIFICATIONS

BS, Journalism, Ohio University

BFA, Performance & Choreography, Ohio University

### PROPOSED PROJECT ROLE

General Project Manager

### MEDICAID EXPERIENCE

7 years

### KEY QUALIFICATIONS

- Experience managing and developing Advance Planning Documents (APDs)
- Experience managing and supporting large, enterprise-wide IT procurement, implementation, and operations projects
- Experience in Medicaid Health Information Technology (HIT) data-focused project work, including data sharing, database management, data source identification, and data governance

### RELEVANT EXPERIENCE

#### **BerryDunn (10/2017 to Present)**

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

#### **– West Virginia Department of Human Services (DoHS)**

*Program Manager (07/2023 to Present)*

As a Program Manager, Meghann provides project oversight, guidance and support for various projects including:

- Medicaid & Children's Health Insurance Program Enterprise System (MCES) Procurement Assistance Project (07/2024 to Present)
- Systems Development Life Cycle (SDLC) Coordination Project (06/2024 to Present)
- Medicaid Enterprise Data Solution (EDS) Implementation and Centers for Medicare & Medicaid Services (CMS) Certification Project (07/2023 to Present)
- Data Improvement Project (DIP) (07/2023 to 06/2024)
- Public Health Emergency (PHE) (07/2022 to 06/2023)



▪ **Medicaid Information Technology Architecture (MITA) State Self-Assessment (SS-A) Maintenance Project (07/2022 to 06/2023)**

– **West Virginia (WV) Bureau for Medical Services (BMS)**

*Medicaid EDS Implementation and CMS Certification Project (10/2019 to Present)*

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

*Enterprise Program Management Office (EPMO) Project (07/2019 to Present)*

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

*Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (11/2021 to 11/2022)*

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

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

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

*MITA State Self-Assessment (SS-A) Maintenance (08/2020 to 04/2021)*

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

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

Meghann supported the Data Visioning and Warehouse Development and Procurement Assistance Project, a project focused on supplying project management services to WV in an effort to assist with the integration of data sources, systems, and databases within the Bureau for Medical Services. As a project coordinator, Meghann developed agendas, captured meeting notes, tracked action items, and supported the development of key project deliverables. Meghann managed the development process and contributed to the following deliverables: monthly status reports; Data Warehouse Decision Support System (DW/DSS) Request for Proposal (RFP); Implementation Advance Planning Document Update (IAPDU); Requirements Traceability Matrix (RTM); proposal



evaluation packets; test scenarios; capstone data source integration road map; and project closeout. She was responsible for managing client repositories, including 200+ data dictionaries and 450+ data sharing agreements. Meghann also developed MS Visio process flows to document client data sharing practices.

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

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

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

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

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

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

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

**College Summit (04/2011 to 07/2014)**

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

**University of Charleston (10/2006 to 03/2011)**

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

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

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

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

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

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

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

**American Dance Festival (06/2004 to 07/2004)**

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



## Crystal Fox, Prosci® CCP

SENIOR CONSULTANT

Berry, Dunn, McNeill & Parker, LLC

### EDUCATION AND CERTIFICATIONS

MLC Certified Medicaid  
Professional (HIT +  
MCMP-II)

Prosci® Certified Change  
Practitioner

### PROPOSED PROJECT ROLE

General Project Manager

### MEDICAID EXPERIENCE

19 years

Crystal, a technical engineer and systems analyst, is a senior consultant in BerryDunn's Government Consulting Group. Crystal provides project management services for West Virginia's Payment Error Rate Measurement (PERM) and Medicaid and Children's Health Insurance Program Enterprise System (MCES) Procurement Assistance projects. Crystal has experience with financial system processing and requirements development and analysis. Crystal brings knowledge of Medicaid eligibility and enrollment criteria, Medicaid Management Information System (MMIS) financial and claims processing systems from a technical and business perspective from both her consulting work and 13 years of experience working at DXC Technology, formerly Molina Healthcare. Crystal has helped clients achieve their project objectives in her roles as a Subject Matter Expert (SME) and business analyst on MMIS operations and implementation.

### KEY QUALIFICATIONS

- 13 years of MMIS operations and implementation experience
- 19 years of Medicaid-related experience working directly with single state Medicaid agencies

### RELEVANT EXPERIENCE

#### BerryDunn (10/2019 to Present)

– West Virginia (WV) Bureau for Medical Services (BMS)

*MCES Procurement Assistance (08/2024 to Present)*

Crystal began the MCES project as a SME, before her current role as project manager, supporting BMS, WV's single state Medicaid agency. As a project manager, Crystal is responsible for the management of project objectives and resources and serves as a primary point of contact for project constraints that require escalation. Crystal tracks the budget, project status, risks, and issues; she develops monthly status reports and mitigation strategies to keep the client informed and to help ensure the project meets its goals and objectives. This project includes project management support, subject matter expertise, procurement advisory services, Advance Planning Document (APD) development, and purchasing contract management support.





*APD Consulting Services (05/2023 to Present)*

Crystal serves as a SME for the APD Consulting Services project, supporting the strategic planning of APDs. In this role, Crystal assists the State team with processes for renewal and tracking progress in the development and submission of APD documents to Centers for Medicare & Medicaid Services (CMS), supporting the development, updates, and management of multiple APDs in support of funding for new Department of Human Services (DoHS) systems projects.

*PERM Project (10/2019 to Present)*

Crystal began the PERM project as a SME, before her current role as project manager. As a project manager, Crystal is responsible for the management of project objectives and resources and serves as a primary point of contact for project constraints that require escalation. Crystal tracks the budget, project status, risks, and issues; she develops monthly status reports and mitigation strategies to keep the client informed and to help ensure the project meets its goals and objectives. Crystal drives milestone completion with consistent outreach to stakeholders and close monitoring of the project schedule and timeline. This project includes support throughout all pre-cycle activities, validating claims payment or eligibility errors, researching error remedies, providing oversight for resolution of PERM errors cited for WV, and supporting the Medicaid Eligibility Quality Control (MEQC) portion of the PERM review.

*Children's Health Insurance Program (CHIP), Out-of-Pocket Maximum (MOOP) Project (02/2021 to 10/2023)*

Crystal served as the project manager for the MOOP project, assisting the State team with the planning activities for the MOOP solution. In this role, Crystal communicated with the State and vendor partners, reviewed deliverable documents, and facilitated meetings between the organizations. Crystal managed budgets, timelines, and project resources to help ensure the project remained compliant with federal and State regulations.

*MMIS Fee Schedule and Edit Quality Review (10/2019 to 04/2023)*

Crystal served as a project SME. Crystal reviewed documents and information compiled from policy as well as claim-related stored procedures and desk-level procedures (DLPs) to help ensure compliance with the State Medicaid Plan and State Medicaid provider manuals. Crystal also performed multi-state analysis of Medicaid policies and State Medicaid Plans/Amendments to identify opportunities for WV to expand covered services, reviewed the current MMIS configuration to support the Medicaid National Correct Coding Initiative (NCCI) editing, and reviewed MMIS system configuration to identify where the system does not match the current State Plan or Medicaid policy. Crystal also developed research summaries that provided the client with the findings of the reviews and recommendations to remediate.

*Medicaid Enterprise System Modernization Strategy and Procurement (MES MSP) (02/2021 to 05/2022)*

Crystal served as a project SME and research analyst, researching various states' Medicaid Module implementations and contracts. Crystal served on a team analyzing Vendor Request for Information (RFI) responses to provide estimated outcomes for the MES MSP teams Strategic Plan presented to the State.

*APD Assistance (06/2020 to 08/2020)*

Crystal served as a business analyst for MMIS APD development and updates by updating expenditures and budget based on the previous prior requests to calculate a request for the current and upcoming years.

*Enterprise Program Management Office – COVID-19 Waivers and Flexibilities (03/2020 to 06/2020)*

Crystal served as a business analyst by researching the waivers and flexibilities implemented



under the Coronavirus Aid, Relief, and Economic Security (CARES) Act during the Public Health Emergency (PHE). Crystal prepared summaries that project leads used to incorporate the research findings into presentations presented to the client.

*Mountain Health Promise (MHP) Implementation Project Management Support (12/2019)*  
Crystal served as a project SME. Crystal supported the Operational Readiness Review (ORR) by performing secondary evidence review for the financial management section of the Request for Proposal (RFP) to help ensure that scoring, determinations, and findings were complete, accurate, and corroborated.

– **Colorado Office of the State Auditor (OSA)**  
*Colorado Department of Health Care Policy & Financing (HCPF)'s Recovery Audit Contractor (RAC) Program (08/2023 to 03/2024)*

Crystal serves as a project SME providing research assistance to evaluate the design and operation of HCPF RAC program for compliance with applicable federal requirements. Crystal reviews other states' RAC programs policies and State Plans to identify program features in comparison to the Colorado program.

– **Arizona Health Care Cost Containment System (AHCCCS)**  
*Forensic Accounting/Auditing (04/2023 to 12/2023)*

Crystal serves as a lead for claims analysis of claims processes and procedures and potential program integrity risks and review of payment activity post reimbursement to providers. Crystal provides analysis of findings to provide process recommendations for process improvements and timely detection and prevention of fraud waste and abuse.

– **WV DoHS**

*Managed Care Organization (MCO) Transition Planning Project (02/2021 to 04/2023)*  
Crystal served as the project manager for the MCO Transition Planning project where she assisted the State team in the daily operations and oversight of the MCOs that are transitioning the CHIP fee-for-service population to an MCO-based population. In this role, Crystal communicated with the State and vendor partners regularly, reviewed deliverable documents, analyzed enrollment reports, and facilitated meetings between the organizations. Crystal managed budgets, timelines, and project resources to help ensure the project remained compliant with federal and State regulations.

*People's Access to Help (PATH) DDI Project Management (08/2020 to 02/2021)*

Crystal served as a project SME for financial management and Flexi financial module reviews by providing insight on the Flexi functionality and feedback based on the scheduled deployment approach of the vendor.

*Child Welfare Initiatives Project Management Services (06/2020 to 08/2020)*

Crystal supported this project and served as a business analyst and project coordinator. Crystal scheduled meetings, captured notes during meetings, researched requirements for the development of a performance-based contract RFP for the Bureau for Children and Families' child placing agencies, and updated the RFP document based on reviews and feedback received during the requirement gathering sessions for the project.

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

*Enterprise Objective Monitoring and Control (EOMC) Services (08/2020)*

Crystal served as a business analyst for the Medicaid Enterprise Organizational Structure (MEOS) subproject by reviewing other agencies' Medicaid population and organizational structures and comparing them to the proposed organizational structure for Puerto Rico to support BerryDunn's recommendations.

**DXC Technology/Molina Healthcare (MMS)/Unisys (04/2006 to 06/2019)**



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– **Svc Info Developer III (06/2016 to 06/2019)**

Crystal translated business requirements to system functionality for New Jersey's Single State Medicaid Agency, the Department of Human Services (DHS); developed use case elaborations and business rules using industry best practices; designed unit test cases to help ensure business rules and requirements are being met; managed changes to base lined system requirements using established project change control processes and tools; and wrote SQL queries to validate data and troubleshoot results where applicable.

– **MITA Financial Systems Analyst III (02/2011 to 06/2016)**

Crystal worked with teams to analyze business processes for WV's Single State Medicaid Agency, the DoHS, New Jersey's Single State Medicaid Agency, the DHS, and Idaho's Single State Medicaid Agency, the Department of Health and Welfare. Crystal designed and documented system functionality using industry standard use cases; specialized in all phases of financial processes including, but not limited to; Accounts Payable, Accounts Receivable, General Ledger, Claim Payment, 1099 Processing; and managed changes to system requirements using established project change control processes and tools to include, but not limited to Application Lifecycle Management (ALM).

– **Systems Analyst 5-Financial Analyst (04/2006 to 02/2011)**

Crystal created financial reports/processing for WV's Single State Agency, the DoHS. Crystal worked closely with the client to understand the business needs and gather requirements/specifications for the project; designed and implemented enhancements/modifications for the HealthPAS-Financial system; performed research and analysis on testing results to help ensure accuracy; and resolved production support issues for the HealthPAS-Financials system as needed.



## Eduardo Daranyi, Med, PMP®

PRINCIPAL

Berry, Dunn, McNeil & Parker, LLC

### EDUCATION AND CERTIFICATIONS

MEd, Education, Lesley College

BS, Physics,  
Mathematics, Business  
Administration, Hillsdale  
College

Project Management  
Institute (PMI) Certified  
Project Management  
Professional® (PMP®)

### PROPOSED PROJECT ROLE

General Project Manager

### MEDICAID EXPERIENCE

20 Years

Ed is a principal and leads BerryDunn's Medicaid Practice Group in our Consulting Team. He has provided executive leadership for Medicaid agencies across the country for over 20 years. He offers expertise in managing large-scale technology initiatives, quality assurance, strategic planning, business process improvement, procurement, vendor negotiations, and engagement oversight. He brings teams together with experience managing large-scale technology initiatives and policy implementations, utilizing project management best practices on all of his engagements, ensuring clients benefit for the deep expertise BerryDunn has to provide.

### KEY QUALIFICATIONS

- Senior project management professional, providing principal oversight in over Medicaid 100 projects, leading a Medicaid Practice Group with a management team of 34 and over 134 full-time consultants
- 25 years of Project Manager experience and a Certified Project Management Professional® since 2008
- Almost 20 years of health and human services and Medicaid consulting experience on small and large projects, some of which impacting up to 60% of a state population
- Over 10 years' experience working as a consultant, Engagement Manager and Project Manager for West Virginia Medicaid-related engagements/projects
- Six years working for a Medicaid solution vendor in pharmacy benefits management, preferred drug list management, prior authorization systems, drug rebate negotiations, long term care plan development, and medical claims management

### RELEVANT EXPERIENCE

#### **BerryDunn (09/2005 to present)**

*Principal – Medicaid Practice Group (MPG) Lead (2014 to present)*

As the leader of BerryDunn's MPG, Ed works with seven other principals to oversee all Medicaid projects; including managing risks, staffing/hiring, workload balance, strategy, pricing, contract negotiation, staff development, and business development. Ed's leadership has led to the growth of the Medicaid practice from two consultants in 2005 to over 135 team members in 2024.



His role as the MPG lead involves responsibilities of oversight for the preparation and implementation of an annual business plan, hiring of new resources, coordination of those resources across a national practice, development of staff, and supporting client engagements. He helps ensure that all projects are successful, client-focused, and that project resources are allocated to the appropriate interests of the client.

Under his guidance, the practice responds to emerging trends and helps Medicaid agencies respond to policy changes such as the American Recovery and Reinvestment Act (ARRA), the Affordable Care Act (ACA), Substance Use Disorder (SUD) waivers, and Public Health emergencies, as well as state policies.

Ed leads various initiatives internal to BerryDunn including founding the Learning & Development (L&D) Department and serving as its chairperson. He led the search for the Director and worked with her to establish the program and reinforce good staff development, which ultimately benefits our clients. With the L&D Director and the L&D committee, they developed behavioral competencies which are used as a firm-wide guide for performance feedback and individual development planning.

Ed has developed deep relationships with the Center for Medicare & Medicaid Services (CMS). He services with other MPG leaders as a trusted partner to CMS, providing quarterly reporting on system modernization efforts, ongoing projects, and any changes to Certifications. He has overseen several pilot programs with CMS related to Certification of states systems.

**– West Virginia Bureau for Medical Services (BMS) Department of Human Services (DoHS)**  
*Engagement Manager (2012 to 2021), Contributing Principal (2021 to Present)*

In his role as Engagement Manager, Ed provided oversight of BerryDunn's contract with the Bureau to provide project management services for multiple projects, including the eligibility and enrollment system modernization, Molina Health PAS MMIS implementation; Medicaid DW/DSS implementation; Substance Use Disorder 1115 Waiver development and implementation; ACA planning, analysis, and advisory services; procurement projects; ICD-10 implementation; Adult Quality Measures; CMS advance planning development (APD); CHIP claims system planning, implementation, and stabilization; access to care planning and monitoring; provider re-enrollment; state self-assessments; and other related initiatives.

Since Ed joined the West Virginia project on a full-time basis in 2012, he has held many roles including Engagement Manager, Lead Project Manager and General Project Manager. In 2012, took responsibility for stabilizing and growing the local Charleston office to now employ over 25 local staff. Ed has overseen over 100 projects for West Virginia. Several are described and listed below. He now contributes to West Virginia as a contributing principal, assisting in oversight of the many ongoing projects in that engagement.

**West Virginia Children's Health Insurance Program (WVCHIP) Operational Readiness Review**  
*(2019 to 2022)*

Ed was the Engagement Manager overseeing the State's transition of the WVCHIP program from fee for service to managed care to provide more seamless care between the two programs and offer greater efficiency and opportunities for innovation. The team performed desktop audits of policies and procedures and on-site systems demonstrations of three MCOs selected to provide services to WVCHIP members. The team developed a framework and approach to performing the review; developed a comprehensive readiness assessment tool; facilitated ORR entrance conferences with the MCOs; and performed an evaluation of more than 1,000 MCO policies and procedures to complete the desk-level assessment for the WVCHIP transition to managed care.



The team developed unique and tailored findings reports for each of the MCOs and will prepare an Ongoing Performance Monitoring Transition Plan and facilitate a Virtual MCO Systems Review to assist WVCHIP in assessing MCO readiness.

*WVCHIP MCO Transition Planning Project Phases I and II (03/2019 to 2022)*

Ed provided Engagement Management oversight to help the State transition members from an FFS model to managed care. BerryDunn provides project management and support services; systems transition and readiness planning; facilitation of MCO, MMIS, and Enrollment Broker (EB) file testing; facilitation of weekly Out-of-Pocket (OOP) Maximum workgroup discussions with the fiscal agent, MCOs, WVCHIP, and other key stakeholders and development of the WVCHIP managed care contract. BerryDunn supports technical implementation activities for WVCHIP in advance of the January 1, 2021, go-live date.

*People's Access to Help (PATH) DDI Project Management (10/2017 to 2021)*

Ed, alongside other principals engaged in work for the State, provides strategic direction and oversight to the project team implementing the largest information technology transformation project that West Virginia has ever undertaken, the Medicaid enterprise IES, known as People's Access To Help (PATH). PATH supports the eligibility, enrollment, and administration of the DoHS's human services programs, including Medicaid, Children's Health Insurance Program (CHIP), Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. Ed provides executive leadership working with the internal team, the State, and all vendors, ensuring that all project deliverables are met and risks and issues are appropriately escalated and addressed.

*Substance Use Disorder (SUD) Waiver Initiative Project (02/2016 to present)*

As Engagement Manager, Ed with the BerryDunn team of specialists, developed and successfully negotiated a Section 1115 Waiver Demonstration Project to undertake SUD delivery system transformation efforts in West Virginia. The SUD waiver strengthened the State's SUD delivery system to improve the care and health outcomes for State beneficiaries with SUD through expanded SUD service coverage and the introduction of new programs to improve the quality of care. The team provides annual and quarterly reporting to CMS and financial reporting requirements for budget-neutrality, future technology procurements to support the five-year demonstration, and MCO contract requirements specific to the SUD demonstration. Through this Section 1115 Waiver, West Virginia has the opportunity to test innovative policy and delivery approaches to reform systems of care for individuals with SUD.

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

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



### *Data Visioning and Warehouse Development and Procurement Assistance (2012 to present)*

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

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



- *Provider Enrollment (PEA) Project (2012 to 2015; 03/2017 to 02/2018; 05/2018 to 05/2019)*
- *WVCHIP Data Warehouse / Decision Support System (DW/DSS) Historical Data Testing and Implementation (2012 to 2015; 10/2017 to 04/2019)*
- *Third Party Liability Options Analysis and Procurement Assistance Project (08/2018 to 11/2018)*
- *Innovation Accelerator Program (IAP) Data Analytic Technical Support (09/2017 to 08/2018)*
- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (08/2015 to 08/2018)*
- *Technical and Information Enterprise Project Management Services (TEPMS) Project (05/2017 to 07/2018)*
- *Gap Analysis and Project Management Services (GAPMS) (10/2016 to 06/2018)*
- *Asset Verification System (AVS) Project Management Services and Procurement Assistance (04/2017 to 01/2018)*
- *West Virginia/New Jersey MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 01/2018)*
- *Eligibility and Enrollment RFP Development Assistance (10/2015 to 12/2017)*
- *Income Maintenance Manual Update Project (09/2016 to 09/2017)*
- *Updates to West Virginia Health IT (HIT) Plans and HIT and Health Information Exchange (HIE) APD Assistance (03/2016 to 04/2017)*
- *Project Management of MMIS Procurement, DDI, and Certification (07/2015 to 12/2016)*
- *Safe at Home Advance Planning Document (APD) Update (08/2015 to 11/2016)*
- *RAPIDS (Eligibility System) Transition Facilitation Project (02/2016 to 05/2016)*
- *ICD-10 Transition Planning and Implementation (09/2013 to 03/2016)*
- *Eligibility and Enrollment APD (06/2015 to 09/2015)*
- *PPACA Workgroup Oversight (2012 to 2015)*
- *5010 Refresh Project (2012 to 2015)*
- *State Medicaid Health IT Planning and Health Care Reform Consulting (2012 to 2014)*
- *Non-Emergency Medical Transportation (NEMT) RFP Development (2012 to 2013)*
- *MITA 3.0 Organizational Redesign (2013)*
- *Policy Workflow Assessment (2013)*
- *Prior Authorization Forms Revisions (2013)*
- *ePrescribing Helpdesk and Support (2012)*

– **Ohio Department of Medicaid (ODM)**

*Ohio Medicaid Enterprise System (OMES) IV&V Service (12/2016 to 06/2018)*

ODM is implementing its vision for a modular MMIS in the Ohio Medicaid Enterprise System project and BerryDunn provided IV&V support. As project principal, Ed was responsible for the forming of the project team and initiating the project. Ed met with the Ohio sponsor monthly to review the project status and review identified risks, issues, and recommendations to mitigate those risks and issues. He oversaw the BerryDunn team helping ODM ensure a modular approach and implementation that will work for Ohioans and support ODM's modular certification process,





including applying to Outcomes-Based Certification (OBC) approach. Ed monitored risks and mitigated exposure to the client, project and firm. He managed the project and teamwork and facilitated appropriate stakeholder discussions, implementing smart practices and mitigate risks. Ed helped ensure that all reporting was submitted accurately and timely to CMS. Ed transitioned from this project in 2018 to allow a new principal to establish and grow the relationship with the client.

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

*IV&V, QA, and Technical Assistance Services (04/2008 to 06/2012)*

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

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

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

*Independent Audit of the State IT Services Enterprise Project Management Office (04/2007 to 06/2007)*

Ed was the lead analyst for the North Carolina Office of the State Auditor in charge of conducting an independent evaluation of IT projects managed by the North Carolina Office of IT Services' EPMO. The objective of our evaluation was to determine whether the EPMO's policies, procedures, and practices were significantly improving the likelihood that a given project would be brought in on time and on budget. This included the review of the Medicaid North Carolina FAST (i.e., Families Accessing Services through Technologies), a program designed to improve the way North Carolina DHHS and county departments of social services do business. The Auditor's office utilized the evaluation report to make adjustments to their teams and processes, developing a plan based on the outcomes of our reporting.

– **West Virginia Bureau for Medical Services**

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

Ed provided quality assurance services for West Virginia's MMIS implementation. In addition, Ed worked with the State to oversee several new initiatives that needed to be implemented while the new MMIS was becoming operational, including Medicare Part D and the HIPAA National Provider Identifier (NPI). Ed also focused on establishing and assisting in the management of change management processes, and participated in the certification process and report process development. The project was delivered on time, with no change request, and on budget.

– **Martin's Point Health Care (2005 to 2007)**

*HIPAA Compliance Planning and Implementation*

Ed led a project management effort for Martin's Point Project Management for HIPAA Compliance initiative. He performed an organizational assessment and worked with executive leadership to develop a governance model, which then in turn directed the development of policies and



procedures aimed at keeping the organization in compliance with the HIPAA Rule. Ed facilitated meetings with departments across the organization to create the policies and procedures, presented them to the HIPAA oversight board for approval, and then assisted with the training and implementation of the new procedures.

**Goold Health Systems (GHS) (now known as Change Healthcare) (1999 to 2005)**

GHS is a leading provider of services to Medicaid agencies across the nation. Ed served as strategic project manager, technical writer, office manager, and training coordinator, which entailed developing and managing technical proposal preparation and writing; collaborating and developing strategy with senior management, the Medical Director, and staff pharmacist; providing company-wide management support for strategic project development; designing, developing, and authoring technical user documentation; and preparing and delivering training materials. As a result of the growth experienced while working as a strategic project manager, and in his office manager role, Ed oversaw a move over 200 employees from one office into a larger office complex. His training role included developing trainings for systems such as prior authorization processes and customer service and human resources related trainings for the pharmacies affiliated with GHS.

**– Iowa Department of Human Services**

*Pharmacy Benefit Management Implementation Project Manager (06/2004 to 08/2005)*

Ed served as technical project manager for the implementation of the Iowa Preferred Drug List/Prior Authorization project. In this role, Ed coordinated implementation activities; prepared reports for senior management; developed and monitored work plans; and performed research, analysis, and evaluation of programs, projects, and operational procedures.

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

**– Maine DHHS**

*Implementation Project Manager (05/2001 to 01/2002)*

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

**Electronic Data Systems (1985 to 1988)**

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

**PUBLICATIONS AND PRESENTATIONS**

- *Flexible Contracting and Contracting Best Practices*, Presentation for MESC 2014, 8/19/2014
- *Project Management/Testing*, Presentation for NESCSO workshop (2017)



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- Moderator, MESC Conference sessions (2015-2019)
  - *People and processes: Planning health and human services IT systems modernization to improve outcomes*, 11/23/2020 Blog
  - Published Insights on [www.berrydunn.com](http://www.berrydunn.com) include but are not limited to: *NAMD 2020 reflections: Together towards the future* and *MESC 2020, 2021, 2022, and 2023 reflections*



## Rick Hayward

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

### EDUCATION AND CERTIFICATIONS

AS, Math, Butler County Community College

### PROPOSED PROJECT ROLE

General Project Manager

### MEDICAID EXPERIENCE

3.5 years

Rick brings over 38 years of experience in various roles in the IT industry, including over 21 years working with IT projects related to health and human services (HHS) projects. His experience includes Medicaid Management Information System (MMIS) operations oversight, leading Affordable Care Act (ACA) system modifications, Operations Change Management support, and MMIS Request for Proposal (RFP) development. His experience managing IT projects specifically for Medicaid and HHS gives him insight into the unique risks and challenges associated with delivering these projects on time and within budget.

### KEY QUALIFICATIONS

- Experience with MMIS operations activities
- Experience in major system procurement and upgrade planning, including defining contract modifications, setting performance SLAs, outreach to states, and system demonstration planning
- Experience with Protech Good Grid collaboration tool
- Experience supporting and managing IT needs for IT and Executive Branch agencies/HHS organizations, including change and risk management, decommissioning of multiple legacy systems, and management of business and technical requirements related to system changes

### RELEVANT EXPERIENCE

#### **BerryDunn (12/2023 to Present)**

Rick serves as senior consultant for BerryDunn where he supports West Virginia's single state Medicaid agency, West Virginia Bureau for Medical Services (BMS). He supports data governance and change management activities and serves as deputy project manager supporting Medicaid and Children's Health Insurance Program [CHIP] Enterprise Systems (MCES) procurement and planning.

#### **– West Virginia Bureau for Medical Services (BMS)**

*Systems Development Lifecycle (SDLC) (06/2024 to Present)*

As a project manager, Rick provides support to State change management staff managing systems change and provides recommendations for potential process changes to enhance vendor oversight and improve the State's system support.



*Medicaid & Children's Health Insurance Program Enterprise System (MCES) Data Integration Hub (04/2024 to Present)*

As a Subject Matter Expert (SME) with system technical and MMIS operational experience, Rick provides support to the Data Integration Hub team to align vendor implementation schedules with the Data Integration Hub, bringing Medicaid Information Technology Act (MITA) and MMIS Operations knowledge to support the Data Integration Hub technical development team. He also leverages this knowledge as deputy project manager overseeing the West Virginia Resource Integration Solutions for Enrollees (WV RISE) project supporting procurement activities to upgrade and/or replace the current MMIS system.

*Medicaid & Children's Health Insurance Program Enterprise System (MCES) Procurement Assistance Project (04/2024 to Present)*

First as a SME and most recently as deputy project manager, Rick leverages technical system and operational MMIS experience to aid in developing the MCES Outcomes based RFP and reviewing functional and technical requirements for security, disaster recovery, interface, change management, data management and MMIS modules. Rick brings organizational and facilitation skills to collaborate with vendor and state staff in reviewing these unique requirements.

*Data Improvement Project (DIP) Phase 4 (12/2023 to 06/2024)*

Rick supported DIP Phase 4 activities as a SME. The State requested BerryDunn provide systems development lifecycle (SDLC) coordination services for the Medicaid and Children's Health Insurance Program (CHIP) Enterprise to aid the Bureau in vendor change management oversight. Rick worked closely with the State and vendors to support the State as it works to evaluate, refine, and gather information related to current systems development lifecycle (SDLC) processes and procedures. His work included assessment of existing processes, procedures, and systems, conducting gap analyses, and drafting and presenting documentation in support of SDLC activities.

**Maine Department of Health and Human Services (DHHS) (05/2021 to 12/2023)**

Rick served as the Maine Integrated Health Management Solution (MIHMS) operations manager for Maine's single state Medicaid agency, Maine DHHS. He provided oversight of the day-to-day MMIS operations activities of the State's fiscal agent. In this position, Rick addressed system operations, system change management, user acceptance testing (UAT), department communications concerning change management, state and federal audit responses, and vendor oversight for the states. His responsibilities include managing issues by using the change request process, managing multiple system projects, and managing day-to-day operational activities to help ensure claims were processed appropriately to meet the business needs of multiple units. He was responsible for helping ensure vendor accountability for operational system performance standards, defining performance service level agreements (SLAs), and adhering to contractual obligations. Rick also assisted in major system procurement and upgrade planning including, but not limited to, defining contract modifications, setting performance SLAs, outreach to other states, system demonstration planning, research on customization carry-forward and discussions with the Centers for Medicare & Medicaid Services (CMS) on upgrade planning and certifications.

**Protech Solutions (10/2019 to 04/2021)**

Rick used the Protech Good Grid collaboration tool to oversee an implementation of Good Grid in New England to bring disparate groups of service providers and consumers together with non-profits, for-profits, and state agencies. He worked closely with the MPRN (Maine Prisoner Re-Entry Network) and those in recovery to bring consumers and providers together to be effective and



improve outcomes.

**State of Maine (09/1996 to 10/2019)**

**– Director of Applications (04/2014 to 10/2019)**

Rick supported the IT needs of a Portfolio of 17 state agencies, 200+ applications, and an approximate \$40 million budget using a team of 77 staff in agile software development projects in this position reporting directly to the Chief Information Officer (CIO). His experience included overseeing change management for the IT organization, managing risks, the decommissioning of multiple legacy systems, and management of business and technical requirements related to system changes.

**– IT Manager (04/2005 to 04/2014)**

In this role, Rick supported Medicaid and Human Services systems used by the Behavioral Health and Eligibility units including oversight responsibilities, data analytics, deployments of system enhancements, multiple vendor relationship management, and technical and change management team leadership. He also led the state development team during the ACA implementation for the State of Maine partnering with the state DHHS business management to change the Medicaid Eligibility system to meet federal guidelines for Maine's leverage of and interaction with the Federal Exchange.

**– Systems Team Lead (09/1996 to 04/2005)**

As systems team lead, Rick led projects supporting applications serving DHHS Substance Abuse, Adult Mental Health, and Mental Retardation Bureaus and the two state Psychiatric Hospitals, including a \$5 million Enterprise Information System.

**Atlantic Computer Technologies, Inc. (09/1986 to 09/1996)**

As owner and CEO, Rick focused on all aspects of the business that sold computer hardware and peripherals in a retail setting as well as consulting services to support business customers.

**Supreme Slipper Manufacturing (Mfg.), Inc. (09/1983 to 09/1986)**

Rick supported manufacturing operations for large shoe manufacturer employing hundreds of production and distribution workers.

**United States Air Force (11/1972 to 12/1981)**

Rick served in the 197th U.S. Air Force as an Inventory Management Specialist supporting aircraft and missile supply needs while stationed at various bases stateside and overseas.



## Elizabeth "Liz" Vose, MPA

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

### EDUCATION AND CERTIFICATIONS

MPA, Finance & Information Management, Rockefeller College of Public Affairs & Policy

BA, French Literature and Language, Skidmore College

### PROPOSED PROJECT ROLE

General Project Manager

### MEDICAID EXPERIENCE

10.5 years

Liz is a senior consultant in BerryDunn's Medicaid Practice Group (MPG) presenting with a strong understanding of state government oversight of Medicaid managed care compliance. She has 12 years' experience in regulatory/policy environment at the crossroads of government and managed care plans, as well as demonstrated success in managing government regulatory and communications activities for New York State and on a national scale. She has a successful history in engaging internal and external stakeholders to promote Medicaid Initiatives.

### KEY QUALIFICATIONS

- Experience leading large-scale transformation across multiple state agencies
- Drafted managed care requirements New York, Ohio, West Virginia
- Developed MCO compliance component of Comprehensive Oversight and Monitoring Plan framework for Administración de Seguros de Salud – Puerto Rico
- State experience directing managed care compliance activities
- Designed beneficiary and provider engagement plans to inform managed care changes in Missouri, New York, Ohio, and Federal TRICARE program
- Led managed care procurement and readiness review efforts for multiple states
- Experience translating RFP requirements into MCO model contract
- Directed behavioral health federal quarterly reporting activities
- Provided oversight and technical assistance to help ensure 1115 federal waiver compliance
- Over 10 years' experience in Medicaid policy, transformation initiatives, compliance, and stakeholder engagement
- State agency management and national consulting perspective on Medicaid managed care transformation and oversight
- Background in transitioning behavioral health services and populations into Medicaid managed care



## RELEVANT EXPERIENCE

### **BerryDunn (02/2022 to Present)**

Liz is a senior consultant with BerryDunn and serves as a program manager for managed care projects. In addition, she provides support to the Office of Procurement Services to streamline purchasing efforts across various procurement projects.

#### **– West Virginia (WV) Department of Human Services (DoHS) (07/2022 to Present)**

##### *Programmatic Managed Care Support (06/2024 to present)*

Serving as program manager for the Programmatic Managed Care Support project, Liz oversees the project team monitoring activities and the requests of incoming sub-projects for ongoing technical support and assistance activities for new initiatives. Projects include implementation of Senate Bill 820 provisions, aligning WV Dual Special Needs Program with Medicare Part D Final Rule, designing, and launching managed care modules for the Medicaid Learning Center, and conducting onboarding activities of a new managed care organization.

##### *Purchasing Support (03/2024 to Present)*

Liz serves as a procurement Subject Matter Expert (SME) in support of the Office of Procurement Services to streamline purchasing efforts across various procurement projects. She provides support across multiple procurement projects including, Child Welfare Initiatives (CWI) Phase, WV Resource Integration Solutions for Enrollees (WV-RISE) Procurement Assistance Project, Asset & Income Verification Procurement, and Incident Case Management Support.

##### *Advanced Planning Document (APD) Consulting Services Support (08/2023 to Present)*

Liz serves as a project liaison for the APD consulting services team as needed. She developed the APD toolkit and assists with client related supports.

##### *Certified Community Behavioral Health Center Project (CCBHC) (06/2023 to Present)*

Liz serves as a Medicaid Managed Care SME for this initiative designed to help ensure access to coordinated, comprehensive behavioral healthcare.

##### *1115 Demonstration Behavioral Health Project (05/2023 to Present)*

Liz serves as a Medicaid Managed Care SME for the project designed to evolve the continuum of care for individuals with SUD by adding and expanding services under the Section 1115 demonstration to better support Medicaid enrollees with SUD.

##### *Mountain Health Trust Phase II (11/2023 to 06/2024)*

Liz served as the Medicaid Project Manager and Managed Care SME. Liz managed the project and led a team of consultants. Her responsibilities included providing oversight of the project team's day-to-day activities, facilitating meetings, and monitoring progress against the agreed-upon deliverables.

##### *Legislative Implementation Assistance Project (LIAP) (09/2023 to 10/2023)*

Liz served as the Medicaid Project Manager. Liz managed the project and led a team of consultants. Her responsibilities included providing oversight of the project team's day-to-day activities, facilitating meetings, and monitoring progress against the agreed-upon deliverables.

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

Liz served as the Medicaid Project Manager and Managed Care SME. Liz manages the current ongoing phase of the project and leads a team of consultants. Her responsibilities include providing oversight of the project team's day-to-day activities, facilitating meetings, and monitoring progress against the agreed-upon deliverables.

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

Liz served as the Medicaid Project Manager and Managed Care SME. Liz managed the project and





lead a team of consultants. Her responsibilities included providing oversight of the project team's day-to-day activities, facilitating meetings, and monitoring progress against the agreed-upon deliverables.

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

Liz worked as a Senior Government Consultant to assist state governments on a national scale implementing Medicaid programs and stakeholder engagement initiatives. She established Medicaid compliance programs for states that comport with federal regulations, drafted, and presented Requests for Proposals (RFP) to secure funding for future contracts, and developed a platform to assist state governments in tracking and trending compliance issues over time. She worked with Finance, Policy, Clinical and Operations teams to offer comprehensive consulting services for state Medicaid agencies, including but not limited to the Ohio Department of Medicaid, Missouri Department of Social Services, New Hampshire Department of Health and Human Services, Puerto Rico Administración de Seguros de Salud, and Delaware Department of Health and Social Services. Liz supported the United States Defense Health Agency in developing a public engagement strategy to inform changes to the federal TRICARE health program.

**New York State (NYS) Office of Mental Health (12/2013 to 03/2019)**

Pursuant to Article 44 of the Public Health Law (PHL), the NYS Medicaid agency, the Department of Health (SDOH), jointly oversees the Medicaid managed care program with the Commissioners of the Office of Mental Health (OMH) and the Office of Alcoholism and Substance Abuse Services (OASAS), for New York State's Medicaid managed care program. Under this construct, Liz's roles included:

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

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

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

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

*Project Manager (12/2013 to 04/2015)*

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

**SUNY Albany (09/2011 to 12/2013)**

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

**HAVE Inc. (04/2007 to 08/2009)**

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



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**New York & Company (09/2002 to 08/2005)**

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



## Mary Stewart, MS

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

### EDUCATION AND CERTIFICATIONS

MS, Management, Baker University

BBA, Baker University

### PROPOSED PROJECT ROLE

General Project Manager

### MEDICAID EXPERIENCE

20+ years

Mary is a qualified health and human services (HHS) professional with 20+ years' Medicaid experience and extensive knowledge of the Medicaid Management Information System (MMIS) [Beneficiary, Claims/Encounter, Eligibility, Provider, Pharmacy, Managed Care, MARS, Reference, Prior-Authorization, AVRS, SURS and TPL sub-systems]. She is a subject matter expert (SME) in claims analysis, claims adjudication, and encounter management, as well as an experienced healthcare business analyst specializing in Medicaid and Managed Care entities. Other experience includes assessing business readiness and implementing change management processes, user acceptance testing (UAT), and aligning technology to process and people.

### KEY QUALIFICATIONS

- Experience in onboarding multiple Managed Care Organizations (MCOs) for the state of Kansas, including the Request for Proposals (RFP) and participating in the evaluation and selection team for contract awards
- Worked alongside state contracted actuary in the development and negotiation process of managed care capitation rate setting
- Wrote the MCO Quality Strategy Report for submission to the Centers for Medicare and Medicaid Services (CMS)
- Experience with leading readiness reviews and on-site desk audits for MCO program areas, including Provider Network Adequacy, Long Term Services and Supports, Claims Adjudication, and financial reporting
- Two years of MCO contract oversight in the state of Iowa overseeing MCOs, administering contract requirements, and mitigating steps when out of compliance
- Experience in leading MMIS Modernization efforts in Kansas, Iowa, New Mexico, and West Virginia

### RELEVANT EXPERIENCE

#### BerryDunn (10/2022 to Present)

##### – Alaska Department of Human Services

*Alaska MMIS System Support Vendor project (12/2024 to Present)*

As an MMIS vendor SLA compliance analyst, Mary reviews monthly service level agreements (SLAs) to help ensure the vendor is



compliant with the contract.

***Alaska Pharmacy Module Replacement Procurement (11/2024 to Present)***

Mary serves as a SME on pharmacy requirement elicitation and is familiar with the NASPO value-based purchasing contracting vehicle. She creates SLAs, performance measures, deliverables for State review. Mary is also familiar with the Streamlined Medicaid Certification process and Outcomes-based Certification, including state and Federal Outcomes. She leads Pharmacy meetings with State staff, tracks all action items to completion, and maintains the Work Breakdown Structure (WBS) project plan.

***Alaska MMIS Fiscal Agent Project (10/2022 to Present)***

As a SME, Mary reviews monthly SLAs to help ensure the vendor is compliant with the contract. In addition, she reviews the monthly vendor invoice for accuracy.

**– West Virginia (WV) Bureau for Medical Services (BMS)**

***Programmatic Managed Care Support, (06/2024 to Present)***

Mary supports the department with policy research, development, quality, reporting, and curriculum development.

***Medicaid & Children's Health Insurance Program Enterprise System (MCES) Procurement Assistance Project (01/2023 to present)***

Mary serves as a SME working with WV's single state Medicaid agency to procure a new modernized MMIS platform. She supports all aspects of the project pertaining to soliciting a new vendor through a RFP process.

***Mountain Health Trust Procurement Assistance Project (01/2023 to 06/2024)***

Mary served as a managed care SME on the WV Mountain Health Trust (MHT) re-procurement project. She researched other state methods regarding contract oversight.

***MES MSP Project, Home and Community Based Services, Incident and Case Management System (ICMS) project (05/2023 to 04/2024)***

Mary served the MES MSP project as a SME supporting research support, specifically on the ICMS forms and reports analysis.

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

***People's Access to Help (PATH) Project (11/2023 to 01/2024)***

As a SME working with BMS, WV's single state Medicaid agency, Mary was charged with prioritizing change requests for the Child Support module, based on the state determining level of severity.

**Rose International (10/2021 to 10/2022)**

Mary served as a business analyst for the State of New Mexico to assist with the implementation of the Electronic Visit Verification (EVV) system for the Self-Directed Community Based (SDCB) population. She edited Business Requirement Documents, wrote change requests, and confirmed their completion, and attended Change Request Requirement Sessions. She also reviewed all training materials and attended training courses to help ensure end-users understood the new system. Mary provided feedback to leadership on ways to streamline current processes. She collaborated with the Provider Management team on streamlining current database processes and reviewed MCO contracts for compliance with the 21st Century Cures Act.

**Iowa Department of Human Services (DHS) Medicaid Enterprise (10/2019 to 09/2021)**

Mary served as Managed Care Oversight and Support Bureau Chief for Iowa's Medicaid program to lead a \$5+ billion Managed Care and Dental Wellness Program with the mission to improve member health outcomes, improve program efficiency and help ensure program sustainability. She supervised 12 direct hires primarily responsible for contract compliance oversight, remediation of compliance and performance issues, managed care oversight, actuarial rate



setting, quality improvement, encounter data submission accuracy, and data analytics. Mary led strategic planning related to regulatory implementation, onboarding of new programs and services, alignment of best practices, and continuous program and process improvement. She also collaborated with internal and external entities on aspects tied to fiscal oversight, actuarial rate development, and information technology systems. Mary provided relevant feedback on modernization for the current MMIS system including collaboration with multiple stakeholders on the creation of user stories relevant to the Iowa Medicaid program.

**Centene Corporation (12/2018 to 10/2019)**

Mary served as a Claims Management Manager with 16 direct hires responsible for the daily operations of accurate claims processing. She worked with Provider Relations Contracting Department to help ensure contract requirements aligned with the claims system, assisted Operations Director with the encounter/eligibility file transfer process, and identified and implemented operational efficiencies, process improvements and developed policies and procedures. Mary also analyzed provider/member impacts and responded to complex escalated claims processing issues to help ensure that provider/member expectations were met.

**Conifer Health Solutions (02/2018 to 12/2018)**

Mary served as a Claims Denial Prevention Analyst to provide solutions to hospital departments on eliminating/reducing denials; analytics on all department denials; and coordinated resources to meet department specific needs.

**Kansas Department of Health and Environment (01/2002 to 02/2018)**

**– Division of Health Care Finance (DHCF)**

Mary held several roles in her tenure with the DHCF, KS's single state Medicaid agency, with responsibilities as listed below:

*Data Analytics/Business Analyst Manager (05/2014 to 02/2018)*

Mary managed a team of eight healthcare data analysts responsible for all reporting requirements. She managed and delivered all legislative and internal/external policy fiscal impacts. She defined data reporting needs for the implementation of the modernized eligibility system, collaborated with the operations team on validation and accuracy of the HIPAA 837, 834 and 820 transaction files with the MCO, and utilized Agile-Waterfall Hybrid Methodology for the Modernization of the Kansas Medicaid Management System (KMMS)–Data Warehouse, Beneficiary, Provider, and Claims/Encounters modules. She led requirement verification sessions, gathered business requirements, and wrote Business Requirement Documents for the Medicaid Modernization project, as well as participated in the Design, Development, and Implementation (DDI) sessions. Mary also created, performed, and audited all UAT for the implementation of the MMIS modernized Data Warehouse.

*Fiscal Analyst/Business Analyst Manager (10/2002 to 5/2014)*

Mary was responsible for requests and statistical measures of Medicare/Medicaid data through the application of quantitative and qualitative analyses. She updated all monthly/quarterly expenditure reports for CMS; provided Kansas legislature and health professionals with monthly trend reports. Developed and set policy for agency medical programs and was instrumental in implementing IBM® Watson Health's reporting tool, Advantage Suite. She held a vital role in writing sections of RFP for procuring MCO, a new MMIS vendor, and actuarial contracts. Mary was also part of the team that reviewed, evaluated, and scored submitted RFPs.

**– Bureau of Remediation**

*Business Analyst/Lead Researcher (01/2002 to 10/2002)*

Mary serviced and tracked loans for the revolving Federal loan fund program. She also redesigned and maintained the Bureau's website and worked with a team of colleagues to create an on-line



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web-based grant writing application.



## MaryLou Banker, CAPM®, LSSGB

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



MaryLou is a senior consultant in BerryDunn's Government Consulting group, with 20+ years in project coordination and management. MaryLou brings diverse experience working with agencies in states such as Massachusetts, West Virginia, and Puerto Rico, as well as federal partners such as Health and Human Services (HHS), Centers for Medicare & Medicaid Services (CMS), and Federal Emergency Management Agency (FEMA).

### EDUCATION AND CERTIFICATIONS

Certified in American Sign Language (ASL),  
Northeastern University

Certificate in Computer Operations, Computer Learning Center of Boston

Certified Associate in Project Management (CAPM®), Project Management Institute®

Certificate in Lean Six Sigma Green Belt (LSSGB)

Medicaid Learning Center (MLC) Certified Medicaid Professional (MCMP-II)

### PROPOSED PROJECT ROLE

General Project Manager

### MEDICAID EXPERIENCE

12 Years

### KEY QUALIFICATIONS

- Over two years' experience providing Certification support.
- Over six years' experience providing Independent Verification and Validation (IV&V) services.
- Over 12 years' experience providing Medicaid support.
- Over 14 years' experience providing IT technical support.

### RELEVANT EXPERIENCE

#### BerryDunn (03/2013 to present)

– **West Virginia Department of Health Facilities (DHF)**  
*Contract Labor Management Services (05/2024 to present)*  
As a general project manager, MaryLou developed a Request for Pricing (RFP) to procure a single vendor to manage contracted labor for all State-owned hospitals. MaryLou conducted State research, presented findings, and gathered requirements for review in joint requirement sessions. MaryLou also provided group scoring tools to support the vendor evaluation activities and will continue to support DHF through the vendor selection activities.

– **West Virginia Department of Human Services (DoHS)**  
*Medicaid Enterprise System Modernization Strategy and Procurement Project (MES MSP) (03/2023 to present)*

As a general project manager MaryLou is assisting in the developing an outcomes-based RFP to procure a single vendor in support of the Centers for Medicare & Medicaid Services (CMS) streamlined modular certification process. MaryLou has conducted State research, presented findings, and gathered requirements for review in joint requirement sessions. MaryLou has assisted in developing and maintaining the action item tracker. MaryLou will provide group scoring tools and training sessions to State Staff in support of the vendor evaluation activities.



*People's Access to Help (PATH) DDI Project Management (07/2020 to 11/2023)*

As a lead business analyst, MaryLou facilitated weekly meetings with project leads to discuss the Child Welfare configuration action items. MaryLou was responsible for maintaining the action item tracker within the Application Life cycle Management (ALM) system. MaryLou was also responsible for reviewing functional design documents, mapping requirements to designs, and identifying requirement gaps. MaryLou assisted with mapping certification outcome criteria for Eligibility and Enrollment (E&E) requirements. MaryLou provided a weekly project status report to both BerryDunn and West Virginia stakeholders that addresses key project health items, such as progress of configuration and requirement design.

*Asset Verification System (AVS) Procurement Assistance Project (02/2023 to 10/2023)*

As a business analyst MaryLou was responsible for providing content to assist in the development of the AVS Request for Quotations (RFQ) and Implementation Advance Planning Document (IAPD) documents.

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

*Puerto Rico Eligibility and Enrollment (PREE) Enterprise Objective Monitoring and Control (EOMC) Services (01/2020 to 01/2022)*

As a business analyst and project coordinator, MaryLou reviewed the evaluation criteria for the Outcomes-Based Certification (OBC) effort of the new E&E system. MaryLou assisted in mapping criterion to system requirements and test cases in preparation for system demonstrations set forth by the Centers for Medicare & Medicaid Services (CMS). MaryLou has developed a reusable checklist to help other states prepare for operational readiness review (ORR) and the final certification review (CR). MaryLou created and organized an extensive project documentation repository to help maintain over 1,000 documents. MaryLou also prepared and oversaw the development of the monthly status report deliverable and participates in weekly project status meetings.

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

*Mountain Health Trust (MHT) MCO Procurement Assistance Project (09/2019 to 09/2020)*

As a project coordinator, MaryLou effectively summarized the client's needs and issues in meeting notes. MaryLou also contributed and brainstormed with the BerryDunn team regarding project research assignments.

**– Massachusetts HIX/IES Entities**

*Independent Verification and Validation (IV&V) Services (03/2013 to 09/2019)*

The Massachusetts Health Insurance Exchange and Integrated Eligibility System (MA HIX/IES) project focused on enhancing HIX/IES to establish a fully integrated system for determining eligibility for a variety of state-funded health and human service programs, which included Medicaid and Qualified Healthcare Programs (QHP). As an IV&V analyst and project coordinator, MaryLou provided critical supporting data for findings and recommendations in the IV&V Monthly Assessment report. MaryLou developed and maintained dashboards and report templates for tracking planned requirements vs. requirements delivered. In addition, MaryLou monitored and reported on risks and issues, including analysis of the stability of the HIX/IES production system, review and tracking of planned system integrator contractual system requirements vs actual requirements delivered, and analysis of active work-arounds needed to operate the solution. MaryLou supported the BerryDunn contractual deliverable review and submission process, as well as the IV&V deliverable review and comment management effort for all the IV&V resources. MaryLou participated in weekly meetings related to CMS Blueprint testing, test case verification for CMS scenario results, and submission of testing results to CMS for approval. MaryLou has experience with IBM® Rational Quality Manager (RQM), IBM® Rational Requirements Composer (RRC), and ALM automated testing tools (e.g., Selenium). In addition, MaryLou has coordinated





and conducted User Acceptance Testing, recorded test results, provided testing metrics, and requirement traceability reports.

**Town of North Reading (04/2011 to 05/2013)**

MaryLou worked for the Town as a Board of Selectmen transcriptionist. MaryLou attended board meetings and documented meeting minutes.

**Homeland Security FEMA (02/2011 to 11/2011)**

MaryLou held multiple positions with FEMA, including working as a logistic supply chain management system specialist. In this position, MaryLou was responsible for total asset visibility (tracking temporary housing units shipped to and from staging areas), helping to ensure proper time arrival of commodities, providing reports as needed to upper management, helping to ensure all employees received the accounts required to complete their mission (email, network, database), helping to ensure mission information and tools were provided to all, providing accountability report daily to management, ordering office and field supplies as needed, receiving temporary housing units for flood applicants, inspecting two to three bedroom housing units to help ensure FEMA standards and specifications were met, helping to ensure all forms were filled out before releasing housing units to applicants, and supporting the Joint Field Office (JFO) staff procuring materials needed to support applicant process in a timely manner.

**Espresso Plus Inc. (02/2003 to 04/2009)**

As a service manager for the repair and installation of restaurant beverage equipment, MaryLou oversaw daily operations of service department. This included providing daily support to director of operations and sales department, helping to ensure positive customer relations to all aspects of the company, providing input and coordinated process for implementing the Mass90 service module, and documented and trained all service technicians on new process and procedures.

**GENUITY (formerly GTE Internetworking, formerly BBN) (1988 to 2002)**

*Supervisor, Desktop Services*

MaryLou managed operational teams responsible for implementation and support services, implemented Service Level Agreements (SLAs) for all desktop services, led teams in rolling out sales force automation tool (Siebel), managed rollout of a Comprehensive Client Management (CCM) tool to all employee desktops/laptops, and implemented fast-start program for the account creation team to that enabled new employees to be up and running the day of employment.

*Supervisor, IT Help desk*

As a supervisor, MaryLou managed five help desk staff members responsible for daily operations of customer call center.

*IT Help desk Analyst*

MaryLou provided services to a 1,500-employee company base and was a major contributor to implementation of call center ticketing system.



## Alison Barnett, CAPM®, ITIL (F)

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

### EDUCATION AND CERTIFICATIONS

Information Technology  
Infrastructure Library  
(ITIL) Foundation  
Certification

Certified Associate in  
Project Management®  
(CAPM)®

### PROPOSED PROJECT ROLE

General Project Manager

### MEDICAID EXPERIENCE

20 years

Alison brings over 25 years of experience in various roles in the pharmacy industry, including over 20 years working with IT projects related to pharmacy programs, specifically Medicaid. Her project management experience includes drafting Requests for Proposals (RFPs), vendor procurement, implementation project management on both the State and vendor sides, leading Joint Application Development (JAD) sessions, vendor management, developing, executing and validating testing, risk management, creating and facilitating training and managing resources. Her experience managing IT pharmacy projects specifically for Medicaid gives her insight into many of the unique risks and challenges associated with delivering these projects on time and under budget.

Alison led Indiana, Ohio, Illinois and Wyoming in the Certification of their Pharmacy Benefit Manager (PBM) Modules and is familiar with the Centers for Medicare & Medicaid Services (CMS) Outcomes-Based Certification (OBC) process and assists clients in navigating through the certification process. She brings knowledge of drug pricing methodologies, National Council for Prescription Drug Programs (NCPDP) transaction sets, Health Insurance Portability and Privacy Act (HIPAA) policies and associated industry standard transaction sets.

### KEY QUALIFICATIONS

- Over 20 years of Medicaid Pharmacy Benefits Administration operations, development, implementation, certification, and oversight experience, including support of single state Medicaid agencies
- Over 11 years' expertise in providing technical assistance on PBM administration to single state Medicaid agencies

### RELEVANT EXPERIENCE

#### BerryDunn (11/2022 to Present)

Alison is a senior consultant in BerryDunn's Medicaid Practice Group (MPG).

#### – West Virginia (WV) Department of Human Services (DoHS) (06/2023 to Present)

Alison supports the Bureau for Medical Services (BMS) and works directly with the business and technical Subject Matter Experts (SMEs) who currently manage the day-to-day operations of the pharmacy benefits for the WV Medicaid program.



Alison is currently leading the draft of the pharmacy requirements for the upcoming procurement. She also aids in the Streamlined Modular Certification (SMC) process, helping to ensure that the required CMS Outcomes are met.

– **Iowa Medicaid (11/2022 to Present)**

Alison works directly with the business and technical SMEs who manage the day-to-day work of the pharmacy and procurement teams to draft a new RFP to procure pharmacy benefit management and clinical management services, including prior authorization, for Iowa Medicaid. Alison contributes knowledgeable content in terms of requirements development and performance measures while also weaving in the CMS Outcomes Measures for SMC.

Alison also manages and mitigates the risks related to procurement and contracting of the PBM system.

**Change Healthcare (01/2017 to 11/2022)**

As a CMS Certification lead and project manager, contracted with Ohio (OH) Department of Job and Family Services, Illinois (IL) Department of Healthcare and Family Services, and Wyoming (WY) Department of Health, the single state Medicaid agencies for OH, IL, and WY, Alison supported the Evidence Development process for Wyoming PBM CMS Certification, as well as led the on-site review with CMS and their partner MITRE for OH, IL, and WY. She also led the Medicaid Information Technology Architecture (MITA) third-party assessment of Change Healthcare processes/platforms and the R3 Milestone review for State of IL PBM Module.

**Advocate Solutions (8/2014 to 01/2017)**

Alison served as a solutions professional and project manager for the Ohio Department of Medicaid. She wrote an RFP for new PBM services, containing over 700 requirements, and served as a key contributor to the CMS Implementation Advanced Planning Document (IAPD) for new PBM services. She then managed the implementation of new PBM for the Ohio Department of Medicaid-duration of 18+ months, as well as the CMS Certification of the new PBM solution on State side using MECT 2.0 toolkit.

**Catamaran (formerly SXC) (06/2012 to 08/2014)**

As a Pharmacy Claims Manager for Indiana Medicaid, Alison managed all project activities throughout implementation including risk management. She spearheaded the CMS Certification process for the newly implemented PBM system and served as a key player in the PBM implementation project. In addition, Alison was responsible for claims processing system maintenance including additions of edits, utilization management criteria, and prior authorization criteria for the system upon request, as well as the interface between the drug rebate system and claims processing system including experience with both federal and supplemental rebate programs. She developed business requirements for the NCPDP D.0 transition, business design and system specifications for claims processing, test plans and over 1,000 test cases, and end-user training documentation.

**Fusion Alliance (10/2010 to 05/2011)**

As a business consultant, Alison worked with Liberty Mutual to lead JAD sessions to develop and document technical and business requirements, risk assessments, mitigation strategies, and system design. She translated end-user business requirements to technical specifications for implementation of new call tracking software; improved business process to address inefficiencies in the claim intake process, resulting in improved response time from an average of 18 hours to less than 4 hours; and evaluated Commercial off-the-shelf (COTS) software for call tracking tools for intake call center for both cost efficiency and functionality.

**HP Enterprise Services (formerly EDS) (08/ 2007 to 10/2010)**



As the Director of Pharmacy Claims Processing, Alison was responsible for project management throughout the Systems Design Life Cycle (SDLC) for over 50 pharmacy IT related projects. This included all aspects of pharmacy business, including managing 11 employees, budgeting, and department profit/loss statements. She contributed to the success of several high-profile projects for Indiana Medicaid including the pharmacy benefit consolidation, which placed all Pharmacy Benefits Management activities for 800,000 managed care members under the fee-for-service delivery system. This provided the IHCP with the ability to collect drug rebates for all claims for Managed Care Organization (MCO) members, resulting in a significant increase in drug rebate revenue. She also managed four large-scale project implementations, including a new pharmacy claims processing system implementation, Pharmacy Benefits Consolidation (Carve-Out), collecting National Drug Codes on physician administered drugs for the purpose of drug rebate in accordance with the Deficit Reduction Act, and update to pricing methodology for physician administered drugs.

**Electronic Data Systems (EDS) (9/2004 to 8/2007)**

Alison supported business design for system changes by leading the design, development, and implementation (DDI) of the Pharmacy Claims Adjudication system for Indiana Medicaid. This included configuring and maintaining the Preferred Drug list and benefit plan design, delivering provider and employee training for pharmacy-related Indiana Medicaid policy, and leading user acceptance test case development and execution of over 5,000 test cases.

**ACS State Healthcare PBM (07/2003 to 09/2004)**

As a client relations specialist, Alison maintained PDL and benefit plan configuration for Indiana Medicaid. She also delivered provider and employee training for pharmacy-related Indiana Medicaid policy.

**Health Care Excel-PBM (08/2002 to 09/2003)**

At Health Care Excel, an agency contracted to administer the Indiana Medicaid Rational Drug Program, Alison served as a clinical criteria reviewer, applying clinical criteria and working with the claims processing system extensively to override claims for providers and assist them in processing online Medicaid pharmacy claims.

**Wal-Mart Pharmacy (08/1993 to 12/1999)**

Alison served as the head pharmacy technician, handling billing for Medicare and Medicaid including the CMS 1500 form and pharmacy paper claims.



# Marnie Hudson, Prosci® CCP

SENIOR CONSULTANT  
Berry, Dunn, McNeil & Parker, LLC

**EDUCATION AND  
CERTIFICATIONS**

BS, Computer Information  
Systems, Strayer  
University

AS, Computer Science  
Information Systems,  
Delaware Community  
College

Prosci® Certified Change  
Practitioner

MMIS Level II – Claims  
Certification

Medicaid MMIS Level I  
Certification

**PROPOSED PROJECT  
ROLE**

General Project Manager

**MEDICAID EXPERIENCE**

11.5 Years

Marnie is an experienced business and quality assurance (QA) analyst with a developer background and more than 15 years of experience assisting with the implementation of state Medicaid Management Information Systems (MMIS). Her background includes leadership roles on five MMIS implementations and one integrated eligibility system consisting of multiple state social services. In her roles, she managed on-site and offshore teams to successfully develop, implement, and test design of requirements. Her developer background helps to clarify design of requirements and how they should be implemented to support the client's business needs.

**KEY QUALIFICATIONS**

- Successfully managed oversight of over 2,700 requirements to support the on-time and on-budget implementation of an integrated eligibility system consisting of multiple state programs (including Medicaid, Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Child Support, Child Welfare)
- Experience supporting interested and invested parties in identifying functional gaps in requirements design for an integrated eligibility system consisting of 16 state social services programs
- Experience developing and facilitating collaborative working sessions with interested and invested parties, vendors, and the State Project Management Office to gather design criteria for implementation of program business rules into an integrated eligibility system to support business needs
- Experience developing innovative and new process improvement procedures to create a more efficient and effective approach to gathering policy documentation and business rules to support system design



## RELEVANT EXPERIENCE

### **BerryDunn (11/2017 to Present)**

#### **– New Jersey (NJ) Department of Human Services (NJHHS), Division of Medical Assistance and Health Services (DMAHS)**

##### *NJ MMIS Modernization Project (05/2024 to Present)*

As the requirements lead assisting with the NJ MMIS Modernization Project, Marnie supports DMAHS, NJ's single state Medicaid agency, with support services for the Provider Module Medicaid Enterprise Systems (MES) Modernization Project. In this role, Marnie is assisting with development of the Requirement Traceability Matrix (RTM) from a National Association of State Procurement Officials (NASPO) procurement contract, including establishing the RTM in a Jira® environment for successful tracking and monitoring of 758 requirements during Design, Development, and Implementation (DDI). Marnie's responsibilities include review of client and vendor requirement correspondences, participation in client meetings, Jira® configuration sessions, mapping requirements to deliverables, and categorization of deliverables. In addition, she supports the development of the Stakeholder Analysis, including but not limited to identifying potential stakeholders, stakeholder project needs, categorization of stakeholders, identifying the degree of influence, influence levels, communication needs, training needs, and contract information.

##### *MMIS Implementation and Certification Leverage and Reuse Project (11/2017 to 01/2018)*

As a PMO and UAT SME, Marnie supported testing activities as part of the West Virginia/New Jersey Leverage and Reuse Project and worked collaboratively with the New Jersey Replacement Medicaid Management Information System Implementation Team Office. She provided key input into the preparation of UAT planning activities, provided support with project activities associated with MMIS system interfaces, and conducted testing related research as needed to support project activities/testing efforts. Marnie successfully collaborated with the state to help create multiple responsibility assignment matrix charts identifying state roles and more than 70 testing tasks and assigning resources as responsible, accountable, consulted, and informed.

#### **– West Virginia Department of Human Services (DoHS)**

##### *Medicaid & Children's Health Insurance Program (CHIP) Enterprise System (MCES) (04/2023 to Present)*

As the Advanced Planning Document (APD) lead of this project, Marnie supports the development of the Implementation Advanced Planning Document (IAPD) to obtain federal funding for a new modernized Medicaid Enterprise System (MES). She leads a small team to help gather project information to support development of the IAPD. In this role, she helps to ensure the team is collaboratively working together to obtain the appropriate information by way of client input, research and analysis, and Project Management Office (PMO) asset documents. Marnie also helps to ensure her team is equipped with the knowledge and tools for successful development the APD. She helps ensure procedures are followed including facilitating team meetings, working sessions, and seeks Subject Matter Experts (SMEs) as needed.

In addition, Marnie supports the development of the MCES Request for Proposal (RFP) with research and analysis as needed, including leading the efforts for gathering and confirming the Service Level Agreements (SLA) for the RFP.

Marnie also supports the development of the MCES requirements with review and cleanup of requirements gathered and facilitation of Joint Requirements Planning (JRP) Sessions with the client.

##### *Eligibility and Enrollment Implementation Assistance (02/2018 to 05/2024)*



As a Requirements Lead on the People's Access to Help (PATH) project, Marnie supported the success of West Virginia's Integrated Eligibility Solution (IES) project to consolidate and integrate DoHS program service systems into a single enterprise. She managed and tracked the PATH Requirements Traceability Matrix to help ensure each project release supported DoHS's program business needs. She participated in configuration design sessions to help ensure the vendor was accurately understanding and capturing stakeholders' business needs and supporting business rules. In addition, she reviewed and provided input on project deliverables, and she assisted with project activities associated with requirements, including the review and validation activities for the Document Inventory (forms, letters, notices) of all legacy systems. Marnie also provided monthly and periodic status reports for Requirements and Design, including the readiness of each project release. In addition to Marnie's Requirements Lead role, she provided support developing Advance Planning Documents (APD) for Medicaid Enterprise System modernization projects.

**S2Tech/Conduent (07/2016 to 05/2017)**

As a senior business analyst, Marnie drove the implementation of the New York (NY) Medicaid Management Information System (NYMMIS) under the NY State Department of Health, NY's single state Medicaid agency. This included mapping eMedNY legacy data for Financial and Claims appropriately to the database fields in new system, conducting table level analysis on both NYMMIS tables and legacy MMIS tables, and leading the data conversion component for the financial subsystem for the new NYMMIS.

**S2Tech/Xerox (02/2013 to 07/2016)**

*Mississippi Modernized Medicaid Eligibility Determination System (03/2015 to 07/2016)*

In her role with a company contracted with Mississippi Division of Medicaid, Mississippi's single state Medicaid agency, Marnie tested interface components, trained, and led team members to help ensure the proper conduct of testing methodologies and procedures, helped ensure accurate creation and execution of ~300 complex test script scenarios, successfully led the testing team through execution of test scripts across 16 different interfaces/batch processes to support the eligibility determination requirements for approval or denial of Medicaid benefits, and documented and managed testing defects.

*North Dakota Medicaid Management Information System (NDMMIS) (02/2013 to 03/2015)*

Marnie acted as a SME for the implementation of the NDMMIS. She helped ensure all testing efforts were developed and conducted to satisfy the Service Authorization and Electronic Document Management System functional area requirements, ensured the successful execution of ~400 test script scenarios, conducted concept sessions to discuss system functionality, and managed testing defects.

**Independence Blue Cross (IBC) (06/2012 to 01/2013)**

As a senior business analyst, Marnie maintained compliance with Centers for Medicare & Medicaid Services (CMS) mandates and initiatives through various programs in Medicare, including Medicare Part D and the summary of benefits for products. She compiled requirements for improved operational process of monitoring Medicare client's maximum out-of-pocket threshold via the creation of an Access database and conducted concept sessions with product owners to capture business needs for improvements to Access databases.

**Hewlett Packard Enterprise Services (01/2004 to 06/2012)**

Marnie served as chief liaison as well as directed all operational and technical communication activities between Health Plan Enrollment Systems (HPES) (internal and external), the Delaware Medical Assistance Program management team, CMS, and the Delaware Prescription Drug Plans. She also served as a functional developer lead of the MMIS. This included leading the design and development of Medicare Part D System changes using Systems Development Life Cycle (SDLC)



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methodologies, serving as a SME in the Provider & Third-Party Liability Sub-Systems, and implementing CMS annual Federal Regulations in the Delaware MMIS for the Reference Subsystem.

**PUBLICATIONS AND PRESENTATIONS**

*What vendors want: Vendor decision process in answering requests for services, a BerryDunn blog, 10/2020*





**Shea Berry-Brennan, Ph.D., MBA,  
MBTI Certified Practitioner, PMP®,  
Prosci® CCP**



**PRINCIPAL**  
Berry, Dunn, McNeil & Parker, LLC

**EDUCATION AND  
CERTIFICATIONS**

Ph.D., University of Charleston  
MBA, University of Charleston  
BS, English, The Ohio State University  
Project Management Institute (PMI) Certified Project Management Professional® (PMP®)  
Prosci® Certified Change Practitioner  
MLC Certified Medicaid Professional (MCMP-II)  
MBTI Certified Practitioner

**PROPOSED PROJECT  
ROLE**

General Project Manager

**MEDICAID EXPERIENCE**

9 years

Shea is a principal in BerryDunn’s Consulting Services Team, focused on providing project management support, research, and analysis services. Shea has over ten years of project management experience, including experience working with state agencies on Independent Verification & Validation (IV&V), project management, strategic planning, organizational development, and procurement assistance projects. Shea has particular Medicaid experience developing her subject matter expertise in the following areas: organizational development and training, Centers for Medicare & Medicaid Services (CMS) certification, modular procurements, Medicaid Enterprise Systems modernization, provider management, care management, security management, and utilization management.

**KEY QUALIFICATIONS**

- Over six years of experience supporting the success of state Health and Human Service (HHS) agency clients
- Extensive experience with modular procurements, implementations, and CMS certification—including Medicaid Management Information System (MMIS), Integrated Eligibility, Provider Management, Care Management, and Utilization Management systems
- Experience in the development of Medicaid enterprise approaches, strategies, and governance

**RELEVANT EXPERIENCE**

**BerryDunn (05/2013 to present)**

- New England States Consortium Systems Organization (NESCSO) Training & Leadership Development Rhode Island Office of Health and Human Services (OHHS) and Maine Office of MaineCare Services (OMS)

*Strategic/ Operations Planning (06/2024 to present)*

BerryDunn was contracted as a follow-up to the Leadership Training with the OHHS leadership team to provide Operations and Strategic Planning support for the Coordination and Administration Oversight



(CAO) team. This included interviews with key stakeholders, document review, and a full-day strategic operations planning session with leaders to support the vision of OHHS and their leadership to find actionable steps to improve project management and coordination across departments and branches.

*Training and Leadership Development (12/2023 to present)*

In collaboration with the NESCSO, the BerryDunn team developed a leadership development training program tailored to address the unique needs of Maine's Medicaid system focusing on the OMS. Additionally, the BerryDunn team worked with the state of Rhode Island's OHHS.

The initial request was focused on matrix organization project management training to enhance cross-collaborative processes and align the states' Medicaid systems with evolving requirements.

BerryDunn introduced and implemented the following methodologies and tools in the process:

- **Lean Six Sigma principles and methodology:** Define, Measure, Analyze, Improve, Control (DMAIC)
- **The VOICE (Valuable Organizational Insights on Culture and Engagement):** BerryDunn's proprietary assessment to drive continuous improvement and increase employee engagement.
- **Kaizen events:** a structured approach to process improvement that encourages teams to work together to identify problems, develop solutions, and implement changes.

The training resulted in actionable recommendations to improve OMS and OHHS's Medicaid systems' operations related to enhanced matrix functions, process improvement culture, formalized project procedures, and improved employee engagement efforts.

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

*Partnership Management (PM) Project and Provider Management Support (12/2023 to present)*

Shea provides executive oversight for the partnership management work provided between West Virginia and partnering States and Territories.

*Provider Management Program (06/2018 to 06/2019)*

Shea served as the program manager for the Provider Management Program for the West Virginia, overseeing multiple projects that interact with the Provider Management Medicaid Information Technology Architecture (MITA) business area in the West Virginia Medicaid Enterprise. As the program manager, Shea lead multiple individual projects, each with its own project manager and dedicated team. Shea was responsible for managing all resources, budgets, deliverables, service level agreements, and risks and issues for all projects in the Provider Management Program. Shea oversaw the following projects:

- **Provider Enrollment (PEA) Year 2 Project**
- **Access to Care Monitoring**
- **Provider Incentive Payment (PIP) Audit Year 7 Project**

*Provider Enrollment (PEA) Project (08/2014 to 12/2016)*

Shea was the project manager on the Provider Enrollment Project and responsible for maintaining and monitoring the project risks and issues log, project issue escalation process, and prove overall health status.

*Project Management of MMIS Procurement, DDI, and Certification (08/2013 to 12/2015)*

Shea served as the project management lead on the Bureau's MMIS implementation. She maintained the project risk and issue log and oversaw the process by which they were escalated to



the client. She was also a liaison between the State and the vendor to address and remediate issues. This required that she facilitate executive level stakeholder meetings with the State, the MMIS vendor, and CMS. Shea also served as a design track lead for the utilization management, care management, provider management, and general/technical tracks. For each track, she was responsible for managing the repository of action items, organizing resources, and tracking decisions. She is also responsible for analyzing vendor deliverables aligned with her tracks to help ensure the correct project documentation has been provided and is available for future use.

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

*Business Process Redesign and Associated Support Services Project, (10/2019 to present)*

Shea serves as BerryDunn's Program Executive Director supporting Hawai'i's single state Medicaid agency, the Department of Human Services. Shea is currently serving in the role for a business process redesign effort for the customer-facing sections of Hawai'i's MQD. Her work includes identifying opportunities for the State to leverage their new Medicaid eligibility determination system to improve efficiency and the customer experience. Before becoming the Program Executive Director, Shea also served as an IT Project Strategist, where she provided assessments and support in strategic planning of the current business models, providing recommendations for possible IT improvements.

– **Missouri Office of Administration Information Technology Services Division**

*State Medicaid IT Assessment Project (07/2019 to present)*

Shea serves as the consulting manager for the Missouri State Medicaid IT Assessment Project. For this project, Shea is leading the assessment of the State's current IT governance approaches and the development of short- and long-term recommendations. Ultimately, BerryDunn will develop a recommended future IT Governance Model. Shea is also responsible for managing all resources, the budget, all deliverables, service level agreements, and risks and issues.

– **West Virginia Department of Human Services (DoHS)**

*RAPIDS (Eligibility System) Transition Facilitation Project (02/2016 to 05/2016)*

Shea served as the project lead for the DoHS Office of Management and Information Services' (MIS') eligibility and enrollment vendor transition project. West Virginia had a condensed time frame to transition the maintenance and operations of its existing eligibility system from one vendor to another. Shea led and facilitated key knowledge transfer and the resolution of critical project issues. Additionally, she managed a team of five in supporting MIS in deliverable review, risk and issue tracking and mitigation, and executive status reporting.

*Eligibility and Enrollment Request for Proposal (RFP) Development Assistance (10/2015 to 01/2016)*

Shea served as the requirements manager for this project. As a member of the project management team, Shea supported the development of the approach to gather requirements from the state agencies that are targeted for inclusion in the RFP, including the Child Care system, the Statewide Automated Child Welfare Information System (SACWIS) system, the Child Support System, and the core eligibility and enrollment solution that services a variety of assistance programs including Medicaid, CHIP, SNAP, TANF, LIEAP, and other West Virginia specific assistance programs. Shea led the requirements development process, facilitated Joint Requirements Planning (JRP) sessions, and escalated risks and issues to impacted stakeholders. Shea developed responses to vendor questions, and created the final question and answers procurement document for the engagement. She also led the development of the evaluation materials and scoring methodology for the procurement, and led and facilitated the evaluation



committee during scoring sessions. Finally, Shea led the team in supporting the State with the development of the final procurement packages, including providing consulting services to both the State and the Federal Partners during the review of the final selection.

– **Alaska Division of Health Care Services (HCS)**

*MMIS Fiscal Agent Solicitation Consultant Services (09/2020 to 02/2021)*

The BerryDunn team is assisting HCS with visioning, researching, and developing a future MMIS solicitation, including vendor transition support. This included an extensive current state assessment, including staff assessments, web-based research, options analysis, competitive analysis, and cost research; and a final MMIS Modernization Recommendations Report was provided. Shea was the lead reviewer of this report, which ultimately provided multiple future strategic Medicaid Enterprise System (MES) modernization options.

– **Massachusetts HIX/IES Entities**

*IV&V Services (10/2018 to 09/2019)*

BerryDunn provided IV&V services for implementation of the Massachusetts Health Insurance Exchange and Integrated Eligibility System. Shea served as the temporary project manager for BerryDunn's IV&V engagement, overseeing project work and activities. Services included deliverable reviews; verification and validation of automated code review and continuous integration results; cost allocation and financial status reports; review of expected and delivered reusability; independent assessment of implementation readiness; and issue and risk management.

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

*MMIS and Fiscal Agent Services Assessment and Strategy Project (03/2018 to 09/2018)*

Shea served as the lead senior consultant supporting New Hampshire's single state Medicaid agency, the Department of Health and Human Services. Shea supported the MMIS and Fiscal Agent Services Assessment and Strategy Project. For this project, she led a team that assessed the performance and capabilities of the State's MMIS and fiscal agent services relative to current industry systems and standards, and developed potential MMIS re-procurement options. Additionally, Shea led the deliverable's development for this project, including the final assessment and options report, which included a SWOT analysis and a strategic assessment of the current Medicaid landscape, focusing on significant advancements in new Medicaid enterprise systems and the move to updated approaches and strategies for MMIS procurement.

– **Ohio Department of Medicaid (ODM)**

*Ohio Medicaid Enterprise System (OMES) IV&V Services (12/2016 to 02/2018)*

Shea served as the CMS certification lead supporting Ohio's single state Medicaid agency, the Department of Medicaid. Shea provided IV&V services to ODM on their new modular MMIS procurement project. She managed CMS communications, focused on client relations, and led the IV&V team's certification process. Additionally, Shea helped provide ODM with crucial project health analysis; budget, schedule, and scope analysis; and risk and issue tracking for the Ohio Medicaid program as a whole.

– **CIMCO Building Services (06/2012 to 05/2013)**

Shea focused on strengthening the company's ties to their clients by performing site visits, carefully watching safety compliance, and helping to ensure quality work. From March 2013 to August 2013, she focused on project management by reviewing cost and inflation, performing quality checks, managing risks, and controlling project deadlines. In this position, she obtained



extensive project management experience.

Before moving to her project management position, Shea worked as a service coordinator, focusing on dispatch, billing, drafting letters, QA, and recruiting new work. In this position, she learned many skills pertaining to interacting with clients and project coordination.



## Brandon Milton, MBA, PMP®, Prosci® CCP

PRINCIPAL

Berry, Dunn, McNeil & Parker, LLC



### EDUCATION AND CERTIFICATIONS

MBA, University of New  
Hampshire

BS, Business  
Administration and  
Political Science,  
University of Maine

Project Management  
Institute (PMI) Certified  
Project Management  
Professional® (PMP®)

Prosci® Certified Change  
Practitioner

### PROPOSED PROJECT ROLE

General Project Manager

### MEDICAID EXPERIENCE

10 Years

Brandon is a leader in the Medicaid Practice Group. He specializes in Medicaid Enterprise Systems and organizational development for State Medicaid Agencies. He leads client engagements and project teams providing strategic planning, IT system selection, project management, process improvement, and quality management services to Medicaid clients across the country.

### KEY QUALIFICATIONS

- Experience with MMIS procurement, implementation and certification (WV, NJ, AK)
- Experience with Medicaid eligibility audits, certification and business process redesign (HI, AK, MO)
- Medicaid Eligibility and Enrollment Toolkit (MEET) experience
- Experience with organization development for Medicaid agencies (HI)
- Over 10 years of government consulting experience

### RELEVANT EXPERIENCE

#### BerryDunn (07/2011 To Present)

– Alaska Division of Health Care Services (HCS)  
*MMIS Fiscal Agent Solicitations Consultant Serves (09/2020 to present)*

Brandon is the project principal for BerryDunn's team overseeing the work performed by our project team, assisting HCS with visioning, researching, and developing a future MMIS solicitation, including vendor transition support.

– West Virginia Bureau for Medical Services  
*People's Access to Help (PATH) DDI Project Management (07/2021 to present)*

Brandon is currently serving as the portfolio manager overseeing BerryDunn's PMO team supporting the implementation project for West Virginia's Integrated Eligibility System (IES) also called People's Access to Help (PATH) to support the eligibility, enrollment, and administration of the WV DOHS's human services programs, including Medicaid, CHIP, SNAP, TANF, Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support.



He manages the PMO team that provides project management, certification and compliance support working directly with CMS and State stakeholders, APD, deliverable review, testing support, organizational change management (OCM) support, requirements support, and general subject matter expertise supporting the PATH DDI project. He works directly with the State's leaders from the Bureau for Medical Services (BMS) (the State's Medicaid Agency), the Department of Health and Human Services Office of Management Information Services (MIS), the Bureau for Child Support Enforcement (BCSE), the Bureau for Social Services (BSS), and the Bureau for Family Assistance (BFA).

*Substance Use Disorder (SUD) Waiver Initiative Phase 1 Project (02/2016 to 07/2017)*

Brandon served in the role of project manager for the development of an 1115 Waiver to create a continuum of care for Medicaid beneficiaries with a SUD in West Virginia. He led a team of policy experts and actuarial analysts to develop the concept for the delivery system and determine the budget neutrality for the waiver services. His work also included the development of an implementation plan for the waiver. The waiver received CMS approval in fall of 2017.

*Project Management of MMIS Procurement, DDI, and Certification (07/2011 to 10/2016)*

Brandon served as the lead project manager for the design, development, implementation, and certification for the West Virginia Medicaid Management Information System (MMIS). His work on the project included managing a core team of 17 individuals and approximately 30 full time equivalents. The project team had responsibility for:

- Facilitation of requirements validation sessions
- Facilitation of business process redesign sessions
- Facilitation of system design sessions
- Quality assurance reviews of the vendor deliverables, including:
  - Project Management Plans
  - Detailed system design documents
  - Business process mapping documents
  - Security, privacy and confidentiality plans
  - System integration test cases
  - Provider documentation
  - Operational readiness plans
  - Training Plans
  - CMS Certification evidence
- Planning and execution of user acceptance testing
- Planning and quality assurance reviews of CMS certification evidence
- Planning and execution of operational readiness testing
- Oversight of service level agreements and system performance in operations

The West Virginia MMIS went live in January of 2016 and the State received their certification letter from CMS in October 2016.

*Data Warehouse / Decision Support System (DW/DSS) Project Management (02/2012 to 12/2014)*



Brandon provided project management and quality assurance services for the Bureau's DW/DSS implementation. As part of this effort, he facilitated business process redesign sessions with the Program Integrity staff to align their business processes with the new case management system. He also facilitated requirements validation sessions; worked with the State in identifying potential data suppliers; and worked with the selected suppliers to determine the data feeds they will provide the DW/DSS. He facilitated design sessions between the State, data suppliers, and vendor to determine the data elements that would make up each of the data feeds. In addition, he developed test cases for UAT to provide end users with assurance that the system processes information according to requirements.

*Provider Enrollment (PEA) Project (09/2011 to 11/2011)*

Brandon provided project management support for the design, development, and implementation of a provider enrollment application and business process redesign for the provider enrollment and validation processes. The provider enrollment application allowed for online processing of Medicaid provider applications. His role was that of project contributor and business analyst. He created status reporting deliverables, assisted the project manager in executing the project according to the project management plan.

– **Hawai'i Department of Human Services**

*Organizational and Business Process Redesign (07/2017 to present)*

Brandon is currently serving in the role of project principal where he supports Hawai'i's single state Medicaid agency, the Department of Human Services. Brandon leads a business process redesign effort for the customer-facing sections of Hawai'i's Med-QUEST Division. His work includes identifying opportunities for the State to leverage their new Medicaid eligibility determination system to improve efficiency and the customer experience.

– **New Jersey Department of Human Services, Division of Medical Assistance and Health Services**

*MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 09/2017)*

Brandon served in the role of Certification Lead for the MMIS Implementation and Certification Leverage and Reuse Project where he supported New Jersey's single state Medicaid agency, the Department of Human Services. In this role, Brandon worked closely with the Implementation Team Office managers, the system vendor, and IV&V to plan for the certification of the replacement MMIS using the latest federal rules and regulations published by CMS. His work included leading a team of subject matter experts in the review of State policies and system requirements for alignment to certification criteria as well as system documentation that provides evidence of compliance for each of the certification checklist items.

**Office of US Senator Susan M. Collins (2007 to 2010)**

As mail director for the Office of U.S. Senator Susan M. Collins, Brandon was responsible for designing, implementing, and managing process improvements to streamline paperless mail operation involving a staff of 75 across eight offices in Maine and Washington, D.C. He reduced response time to constituent inquiries from 30 days to as little as two days and downsized the mailroom staff from four to two employees. In addition, he supervised legislative correspondents and interns; screened and edited outgoing correspondence on behalf of Senator Collins; and created and managed an amendment tracking system for major legislation, including the FY2010 budget, the American Recovery and Reinvestment Act (ARRA) of 2009, and multiple appropriation bills.

**PUBLICATIONS**





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- *West Virginia MMIS Certification Pilot*, Presentation for MESC 2015, Co-presented with Edward Dolly (West Virginia Department of Human Services) and Chris Green (Molina Healthcare), 8/19/2015.



## Julie DuPuis, MPA

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



Julie is a State Medicaid Program subject matter expert with 30 years of state government experience. Working on programs providing comprehensive health coverage to a broad range of individuals, leading, and executing Medicaid and related programs, and improving various reporting processes through system initiatives and quality data monitoring. She has a strong foundation in managed care health delivery systems, including encounter data submissions, data quality and improvement initiatives, rate setting, program integrity controls, and automated systems development.

### EDUCATION AND CERTIFICATIONS

MPA, Health Care Administration, Western Michigan University

BA, General University Studies, Western Michigan University

Fundamentals in Project Management

### PROPOSED PROJECT ROLE

General Project Manager

### MEDICAID EXPERIENCE

13 Years

### KEY QUALIFICATIONS

- Former state employee with over 30 years' experience in state government
- Over 25 years of Medicaid program knowledge, including policy, financing, and delivery including waiver and state plan process
- Strong foundation in managed care health delivery systems
- Adept at migrating MMIS systems from Legacy to an Enterprise environment
- Experience in health plan rate setting, encounter data collection and quality, and financial analysis
- Led projects with multifaceted teams of statisticians in describing data interpretation and presenting key findings to various audiences

### RELEVANT EXPERIENCE

#### BerryDunn (07/2022 To Present)

– **West Virginia Department of Human Services (DoHS)**  
*Take Me Home West Virginia and Home and Community-Based Services Quality Initiative Project (08/2024 to present)*  
Julie serves as a Project manager supporting the creation of a Quality Management Plan required by Centers for Medicare & Medicaid Services (CMS) Money Follow the Person (MFP) and Home and Community-Based Services (HCBS) Long Term Services and Supports (LTSS) mandatory requirements.



*Medicaid & Children's Health Insurance Program System project (05/2024 to present)*

Julie serves the Medicaid & Children's Health Insurance Program System project as a subject matter expert supporting requirements gathering and research support.

*West Virginia Mountain Health Trust (MHT) Phase 2, (03/2024 to present)*

Julie serves as a subject matter expert supporting the program through supporting the department with policy research, development, quality, reporting, and curriculum development.

*Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project, (03/2024 to present)*

Julie serves as a subject matter expert supporting the program with the planning activities for a Medicaid Enterprise System (MES) modernization procurement.

*Medicaid Enterprise System and Enterprise Data Solution projects (07/2022 to present)*

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

*Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project, Home and Community Based Services, Incident and Case Management System project (07/2022 to 04/2024)*

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

**– Minnesota Department of Human Services, Managed Care Contracting and Rates Division  
Minnesota Program of All-Inclusive Care for the Elderly (PACE) Analysis (10/2023 to 06/2024)**

Julie served as a subject matter expert by assisting with actuarial findings, researching PACE programs in other states, and supporting the analysis team.

**Michigan State University, College of Human Medicine, Institute for Health Policy (12/2016 to 07/2022)**

Julie served as a Data Resource Analyst & Medicaid Specialist for Michigan State University where she supported Michigan's single state Medicaid agency, the Department of Health and Human Services. Julie helped ensure effective management of IHP activities on policy analysis, health services research, Medicaid data, and Medicaid program evaluation activities, as well as Medicaid affiliated health programs, from start to finish. This position supported Michigan Department of Health and Human Services programs, university researchers, and other community stakeholders. Julie cultivated collaborative relationships with program officials, demonstrated exceptional programmatic expertise, and initiated new projects and topics centered around national best practices, supported by literature reviews. She consulted state staff with compliance and data quality findings. She acquired and analyzed Medicaid data from multiple sources, acting as an honest broker for MSU on behalf of the Michigan Department of Health and Human Services, Health Services Data warehouse. She was helpful in formulating responses to Centers for Medicare & Medicaid (CMS) questions relating to independent Medicaid program evaluations, structuring data flows, documentation, and instruction relating to Medicaid eligibility and claims. She provided high-level assistance to MSU research faculty and staff in project management, planning and carrying out health service research, reporting on compliance and quality issues, provided potential data resources, interpreting data findings and trained staff on Medicaid resources, system software, and interpreting Medicaid data. Julie contributed to program evaluations, proposal/manuscript development with the aim of improving proposal structure, led projects with multifaceted teams of statisticians in describing data interpretation, and presented key findings to audiences in various presentations.



**Michigan Department of Health and Human Services, Medical Services Administration, Bureau of Medicaid Policy and Actuarial Services, Actuarial Division, Rates and Encounter Data Section (09/2012 to 12/2016)**

Julie served as a Section Manager for Michigan Department of Health and Human Services, Michigan's single state Medicaid agency. She was responsible for making capitation payments for 1.8M Medicaid members with annual expenditures exceeding \$8B. She oversaw the Medicaid expansion population (Healthy Michigan) rate structure, MMIS changes and health plan system capabilities for 600,000 new members in the first year. She migrated the Children's Special Health Care Services, Foster Care and Mi Choice (HCBS) populations from Fee for Service (FFS) environments into capitated arrangements. Acting as the Bureau's system liaison, she interacted with multiple vendors overseeing and setting priorities for system enhancements and data flows between internal state departments and external vendors. Supervised professional staff, supporting State Plan Services, including 1915(b), 1115 waiver services, and other related health care programs, serving 1.8 million members with annual expenditures over \$6 billion. She assisted the managed care plan division in Request for Proposal (RFP) contract language relating to MMIS data flows and encounter data. She delegated and trained personnel in loading rates, calculating health plan related compliance and quality performance withholds, and monitored state budget development. Often this position led projects; defined, and enforced standard operating procedures, interacted with CMS on waiver design, contract language, evaluation reports, and capitation rate thresholds. Using literature reviews and data findings her team recommended best approaches to health plan rate setting and financial analysis, encounter data flow and quality, program change proposals, implemented value-based purchasing initiatives, and legislative bill analysis. Julie oversaw Michigan's Encounter Data Quality initiative through monitoring of complete, accurate, and timely encounter data submissions. She managed the health plan data improvement sessions in face-to-face health plan meetings and other data stakeholders. She consulted and coordinated with CMS, internal and external auditors, state agencies, health plans, providers, county health departments, health professional associations and other community stakeholders. She introduced using encounter data for the Healthy Michigan Plan Population Explanation of Benefits. She helped formulate the algorithm for calculating member premiums for members that were over 135% Federal Poverty Level (FPL). She interacted with the actuary almost daily and other consultants to define rates, initiate system changes, policy, and contract terms.

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

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

Developed position as the lead, responsible in loading and maintaining Michigan's Medicaid



programs capitation rates, calculating managed care plan quality withholds, yearend accruals, portions of CMS-64 reporting and other federal compliance initiatives, consulting on policy, research and respond to auditor findings, and train new staff. Responsible for performing complex analysis of claims and eligibility data from multiple sources; economic research, calculated preliminary and year end accrual estimates. Department's key data analyst of the Michigan Adult Home Help (AHH) and Freedom to Work (FTW) Programs. Instrumental in presenting information to the Governor's Long-Term Care (LTC) Task Force, other advocate groups, upper Department management on aging and care demographics, educating audiences holding down LTC costs. Assisted in forming, writing and implementing policy changes as well as responding to auditor findings. As the Data Analyst for FTW Program, she conducted studies involving demographic and expenditure information on enrollees as well as complete national annual reporting. This work led to an increase in the Medicaid Infrastructure Grant (MIG) awards from 2005, \$500,000 original award to 2010's, \$1.3 million award.

Key organizer and developer of annual budget slide presentation for the Medicaid Director to the Michigan Legislature and other outside organizations. Involved in presentations to Health Maintenance Organization (HMO) executives, Governor's Long-Term Care Task Force, advocate groups, as well as the department's upper management.

Program duties for the Medicaid HMOs involving rate setting and research. Developed position as the lead, responsible in loading and maintaining Michigan's Medicaid rates including Michigan's Comprehensive Health Plan Rates, Children Special Health Services rates, Adult Benefits Waiver, Program of All Inclusive Care for the Elderly (PACE), MICHild rates, MI Child Dental and Healthy Kids Dental rates. Responsible for performing complex analysis of claims data and eligibility data; implementation of capitation rates for the Medicaid managed care health plans, calculated preliminary and year end accrual estimates. Position expanded responsibilities in 2007 to include the start of post-payment work in terms of providing technical guidance to the HMOs involving over \$800 million in new federal matching funds.



## Katie Lauwers, MA

MANAGER

Berry, Dunn, McNeil & Parker, LLC



As an organizational development practitioner, Katie brings more than six years of experience in organizational assessment, stakeholder engagement, project management, and process improvement. She has experience with both private and public sector entities, including working for state and tribal agencies in Alaska and Hawai'i.

### EDUCATION AND CERTIFICATIONS

Lean Six Sigma Green Belt, University of Southern Maine

MA, Behavioral Economics, The Chicago School of Professional Psychology

BA, Psychology, Minor in Religion, Lindenwood University

Gallup Certified Strengths Coach

Trauma-Informed Trained & Certified

### PROPOSED PROJECT ROLE

General Project Manager

### MEDICAID EXPERIENCE

3 years

### KEY QUALIFICATIONS

- One year experience in interpreting and complying with Medicaid program requirements, policies, and data collection/processing relating to the required data base
- One year experience serving the Medicaid aged, blind, and disabled population
- One year experience supporting Medicaid long-term care services
- Five years of experience maintaining Principles of Business Process Redesign
- Five years of experience maintaining Principles of Change Management
- One year experience with Medicaid Enterprise Systems
- Five years in the healthcare industry
- Four years of experience with quality improvement studies and surveys

### RELEVANT EXPERIENCE

#### BerryDunn (06/2022 To Present)

– Hawai'i Department of Human Services Med-QUEST Division Business Process Redesign and Associated Services Project (07/2023 to present)

Katie serves as a deputy project manager for Hawai'i's single state Medicaid agency, the Department of Human Services in the Med-QUEST Division. As deputy project manager, Katie oversees the work of four workstreams for a five-year long engagement focused on strategic project management, release management support, business process redesign, cost avoidance, quality evaluation, policy research and analysis, and training services. Katie closely mentors, coaches, and leads the work with organizational excellence and human-centered design.



#### *Training Support and Implementation Project (06/2022 to present)*

Working specifically with the State of Hawai'i, Katie is supporting a team in providing training oversight, job skills development training, leadership development, and process improvement. Katie focuses her efforts on leading a team to facilitate and support Hawai'i in their operations for the Public Health Emergency and Continuous Coverage Unwinding, as well as facilitating Lean Six Sig Kaizens and a Leadership Development program with the MQD Leadership (BA/SO) team. Katie works closely with leadership to remain responsive to immediate needs as well as providing foresight for future operations, training, and succession planning needs. A series of on-site weeklong experiential learning opportunities with MQD leadership were developed to deliver the process improvement and leadership development trainings, with the goal of improving cross boundary collaboration and improved system's thinking amongst MQD leadership.

Katie developed a Training Oversight and Implementation approach that aligned the current and future needs of MQD with current best practices and Gallup research to support the employee life cycle of all MQD staff. This included a framework focused on onboarding and hiring all the way through to strategic succession planning initiatives that equip MQD to remain focused on delivering the highest quality of services to their most vulnerable populations.

#### **– NESCSO Training & Leadership Development Rhode Island Office of Health and Human Services (OHHS) and Maine Office of MaineCare Services (OMS) (12/2023 to 11/2024)** *Strategic/Operations Planning*

BerryDunn was contracted as a follow-up to the Leadership Training with the OHHS leadership team to provide Operations and Strategic Planning support for the Coordination and Administration Oversight (CAO) team. This included interviews with key stakeholders, a SWOT analysis, document review, and a full-day strategic operations planning session with leaders to support the vision of OHHS and their leadership to find actionable steps to improve project management and coordination across departments and branches.

#### *Training and Leadership Development*

In collaboration with the New England States Consortium Systems Organization (NESCSO), the BerryDunn team developed a leadership development training program tailored to address the unique needs of Maine's Medicaid system focusing on the OMS. Additionally, the BerryDunn team worked with the state of Rhode Island's OHHS.

The initial request was focused on matrix organization project management training to enhance cross-collaborative processes and align the states' Medicaid systems with evolving requirements.

BerryDunn introduced and implemented the following methodologies and tools in the process:

- Lean Six Sigma principles and methodology: Define, Measure, Analyze, Improve, Control (DMAIC)
- The VOICE (Valuable Organizational Insights on Culture and Engagement): BerryDunn's proprietary assessment to drive continuous improvement and increase employee engagement.
- Kaizen events: a structured approach to process improvement that encourages teams to work together to identify problems, develop solutions, and implement changes.

The training resulted in actionable recommendations to improve OMS and OHHS's Medicaid systems' operations related to enhanced matrix functions, process improvement culture, formalized project procedures, and improved employee engagement efforts.

#### **Bradison Management Group (2018 to 2022)**

Katie served as a lead Consultant and project manager for BMG to develop and implement systems and processes to facilitate staffing assessments and organizational assessments,



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professional development, emotional intelligence, governance training, and coaching programs for program and service delivery. She was responsible for all procurement, technical writing, business and corporate documentation, contracting and invoicing, administrative functions, research, and client communication for all projects and internal BMG Operations. She also conducted training established in best practices to connect trends of behavioral economic research, engagement, lean-management, emotional intelligence, internal office systems, and soft-skill development.

**Alaska Executive Search (2017 to 2018)**

Katie supported customer relations for all commercial properties and collaborated with the team to coordinate administrative tasks, logistics, marketing, and proposal review on a temporary services contract. She also communicated with customers to add, update, migrate or disconnect telecommunications services—exported data using M.S. Excel worksheets to monitor orders and customer accounts.

**LPA Clinical Associate (2015 to 2016)**

Katie worked in partnership with the business owner to improve, create, manage, and organize APA ethical protocol of non-profit organization providing mental and behavioral health services in Anchorage, Alaska. She conducted and presented statistical and meta-analytic research on a variety of topics; managed administrative tasks and communications for scheduling, case management, parenting assessments, intake, and billing practices to achieve appropriate caseload and intake; and attended formal training on complex trauma and positive self-care for service providers.





## Jeffrey Stoddard, Prosci® CCP

SENIOR MANAGER

Berry, Dunn, McNeil & Parker, LLC

### EDUCATION AND CERTIFICATIONS

BS, Management of Information Systems, University of Vermont

Prosci® Certified Change Practitioner

Health Leadership Development Program, Daniel Hanley Center for Health Leadership

### PROPOSED PROJECT ROLE

General Project Manager

### MEDICAID EXPERIENCE

5 Years

Jeff is an accomplished strategic leader in healthcare technology and analytics, with a demonstrated track record in spearheading system development initiatives centered around Medicaid, Medicare, and commercial data. His adeptness in engaging with a wide array of stakeholders, fostering consensus, and cultivating productive relationships stands as a testament to his interpersonal competence. Jeff's unwavering commitment to project objectives is consistently underscored by his ability to deliver results punctually and within budget constraints, consequently aiding clients in optimizing operational efficiencies, enhancing care quality, and reducing costs.

### KEY QUALIFICATIONS

- 20+ years' experience leading complex healthcare systems development teams and initiatives
- 20+ years' experience designing data management systems and reporting architecture to support big data initiatives
- Experience leading state data improvement and encounter data quality initiatives
- Experience leading state usability and evaluation of Medicaid Management Information Systems (MMIS) and Data Warehouse/Decision Support Systems

### RELEVANT EXPERIENCE

#### BerryDunn (12/2019 to present)

As a senior manager specializing in data management and strategy, Jeff works with state healthcare agencies, nonprofit and commercial healthcare organizations to assist in system, data, and analytic projects to achieve program objectives related to improving healthcare outcomes and reducing costs.

#### – Minnesota Department of Public Safety Division of Vehicle Services (DVS)

##### *Data Analysis Project (01/2025 to present)*

Jeff provides project leadership to support the state in identifying improvements for operational metric reporting.

##### *Financial Analysis Project (08/2024 to present)*

Jeff provides data ingestion and analysis subject-matter expertise to assist the state in analyzing their FAST vehicle services data.



– **Portland Public Schools**

*Data Reconciliation Project (11/2024 to present)*

Jeff is providing technical leadership to assist the school district with reconciling data between internal systems.

– **U.S. Virgin Islands (USVI) Department of Human Services**

*Universal Data Warehouse Project (10/2024 to present)*

Jeff serves as a Subject Matter Expert (SME) for USVI's Medicaid agency, the Department of Human Services. Jeff provides CMS core measure set and data warehouse subject-matter expertise and support to the USVI.

– **Missouri Department of Labor and Industrial Relations**

*Tips and Complaints Portal Project (08/2024 to present)*

Jeff provided technical leadership and analysis to assist the state with identifying operational metrics and dashboards to implement with their future tips and complaints portal system.

– **Iowa Department of Health and Human Services**

*Quality Management System (08/2024 to present)*

Jeff serves as a SME for Iowa's single state Medicaid agency, the Department of Health and Human Services. Jeff offers subject-matter expertise in systems design and analysis to aid the state in developing a quality management system utilizing their Microsoft SQL Server environment. The project encompasses the creation of long-term services and support (LTSS) measures and dashboards to inform program quality initiatives, as well as the data ingestion and data warehousing components necessary to support these measures and dashboards.

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

*Systems Development Lifecycle (SDLC) Project (06/2024 to present)*

Jeff provides technical leadership and support to assist the state in maturing their SDLC processes to improve operational efficiencies including the implementation of an Atlassian Jira® system.

*Data Integration Hub (6/2024 to 11/2024)*

Jeff provided technical leadership, cloud infrastructure design, system design, and analysis to assist the state in developing a system's integration proof of concept. The project included deploying a secure Amazon Web Services (AWS) cloud infrastructure with single-sign-on (SSO) capabilities, securing the environment based on NIST 800-53 controls, and building data pipelines to exchange data between Medicaid data vendors.

*Data Improvement Project (12/2019 to 06/2024)*

Jeff provided technical leadership and analytic support for the project that assists the state in understanding and addressing data quality and usability issues affecting its Medicaid program.

*Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (06/2020 to 03/2022)*

Jeff provided technical leadership and guidance in supporting West Virginia's initiative to optimize MCO encounter data processes for its risk-based managed care programs.

– **West Virginia Department of Human Services (DoHS)**

*Medicaid and Children's Health Insurance Program (CHIP) Enterprise Systems Project (06/2020 to present)*

Jeff provides subject-matter expertise and architectural support to assist the state in developing a long-term Medicaid enterprise strategy and request for proposal to support the strategy.

*Enterprise Data Solution (EDS) Implementation and Centers for Medicare & Medicaid Services (CMS) Certification (06/2020 to present)*

Jeff provides subject-matter expertise and analytic support to assist the state in implementing their multi-source data warehouse solution.



#### *COVID-19 Contact Tracing and Testing Initiative (04/2020 to 09/2020)*

Jeff provided technical leadership and business analysis support to DoHS for the implementation of the state's COVID-19 contact tracing resource allocation dashboard and COVID-19 testing estimator tool.

#### **– New Jersey Department of Human Services**

##### *MMIS Modernization Project (11/2023 to present)*

Jeff serves as a SME for New Jersey's single state Medicaid agency, the Department of Human Services. Jeff provides technical leadership, analysis, and support to assist the state with the implementation and operation of a Tableau dashboard system to report on MMIS operational metrics. The system utilizes automated AWS data pipelines, Snowflake, and Tableau.

#### **– Puerto Rico Medicaid Program**

##### *Enterprise Data Warehouse (EDW) Business Intelligence System Support (09/2023 to present)*

Jeff serves as a SME for Puerto Rico's Medicaid program, the Puerto Rico Medicaid Program. Jeff provides subject-matter expertise and support to assist Puerto Rico in implementing their multi-source data warehouse solution.

#### **– New Mexico Finance Authority (NMFA)**

##### *Document and Data Management Consulting Project (10/2023 to 06/2024)*

Jeff provided data management and data governance subject-matter expertise to support the NMFA in developing data classification policies and procedures and providing recommendations for improving their data management practices.

#### **– Beacon Health/Northern Light Health**

##### *Data Analytics Project (04/2020 to 12/2023)*

Jeff provided technical leadership and project management services to support the Beacon Health Accountable Care Organization (ACO) with decision support reports to provide operational and program evaluation insights.

#### **Onpoint Health Data (08/2013 to 07/2019)**

As Onpoint's chief information officer, Jeff was a member of the senior leadership team driving both the strategic direction of the company and day-to-day operations, leading technology functions including systems development, infrastructure, and data security.

##### *Data System Development*

Jeff led a diverse team of more than 10 system developers and contractors responsible for building and maintaining the systems used for ingesting, processing, and warehousing all payer claims data. Under Jeff's leadership, the Onpoint system was enhanced to manage healthcare data for over 50 million members and calculate more than 150 healthcare cost, utilization, and quality measures, including Centers for Medicare and Medicaid Services (CMS), ACO, and National Committee for Quality Assurance (NCQA) Healthcare Effectiveness Data and Information Set (HEDIS) measures.

##### *Analytic Enclave Implementation*

Jeff was the primary architect and responsible for the successful implementation of the Onpoint Analytic Enclave, a new service offering that enables users to log in to a secure, performant, cloud-based analytic environment where they can directly access and work with all payer claims data using the tools of their choice. Through the Analytic Enclave, users were empowered to generate analytics and reports to inform healthcare policy, measure program efficacy, and report on state healthcare costs and utilization.

##### *Development and Implementation of a More Robust Information Security Program*

Jeff led Onpoint through enhancing its data security policies, procedures, and controls, which resulted in achievement of HITRUST security certification, the gold standard security certification



in the healthcare industry.

**Arcadia Solutions (04/2012 to 07/2013)**

As a principal consultant for Arcadia Solutions, Jeff led and managed multiple projects and teams to transform the data warehouse and business intelligence capabilities for a community health network in the State of Washington, building an integrated claims and clinical data warehouse with a user interface to be used for population health management. The project was delivered on schedule and within budget.

**Health Dialog (09/2004 to 04/2012)**

As senior director of Operations for Health Dialog, Jeff led a large team of developers, quality assurance analysts, and business analysts responsible for the acquisition, transformation, and quality of healthcare data from many of the largest health plans in the United States. These data were used to drive the disease management function of the business, which resulted in better management of the highest-risk populations, which in turn lead to better health outcomes and a reduction in health plan costs.



## Jim Strassenburgh

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

### EDUCATION AND CERTIFICATIONS

BA, Philosophy, St. Lawrence University

### PROPOSED PROJECT ROLE

General Project Manager

### MEDICAID EXPERIENCE

6 Years

Jim is a senior consultant with BerryDunn's Government Consulting Group. He has over 40 years of IT experience and a rare combination of skills gained from working with large-scale systems architecture projects, including serving as an operations technical lead for critical financial infrastructure on Wall Street, and founding a software development company to build high availability and DevOps products. While at BerryDunn, Jim has focused on healthcare systems, working on several state Medicaid, E&E and social welfare, projects. Jim serves as a trusted technical advisor for his BerryDunn clients.

### KEY QUALIFICATIONS

- 12 years of experience supporting the success of state HHS agencies
- Experience providing systems architecture/design support for eligibility systems including system architecture/design support, data governance, large-scale datacenter creation and migration, and data architecture in states such as West Virginia, Maryland, Massachusetts, Missouri, and Puerto Rico
- Over 6 years of IV&V experience helping clients achieve their project objectives in Maryland, Massachusetts, and Missouri
- Extensive technical knowledge in state and federal eligibility statutes, rules, governance, and processes (e.g., FDSH, MARS-E, National Institute of Standards and Technology, FISMA, HIPAA)
- Jim was the lead architect for a \$250M IT outsourcing project (Xerox)
- Jim designed the high availability platform for AT&T's Internet service, WorldNet. This was the largest single IT project in the world for Sun Microsystems.
- Jim designed and managed the systems infrastructure that fed 65% of all order flow to the floor of the NYSE including 1200 booths on the exchange floor, stood up the first dark liquidities pool, and the 3<sup>rd</sup> largest equity clearing house in the US.
- Jim possesses extensive technical knowledge including expertise in system architecture, and cloud-based systems, including eligibility system migration to Amazon Web Services.



Jim spearheaded the envisioning and construction of RIT's green datacenter

## **RELEVANT EXPERIENCE**

### **BerryDunn (02/2013 To Present)**

#### **– Puerto Rico Medicaid Program (PRMP)**

*Enterprise Architecture Project (12/2024 to present)*

Develop enterprise architecture diagrams and review system interfaces and reporting components at the enterprise level for PRMP.

*Enterprise Data Warehouse Project (03/2024 to present)*

Jim was technical lead for the PMO team focused upon technical details of the solution including working with data warehouse architects to validate system design and ensure systems and security aspects met the needs of the state. In addition, Jim led the data governance aspects of the program.

#### **– West Virginia Bureau of Medicaid Services (BMS)**

*Software Development and Lifecycle Management (01/2023 to present)*

Developed ticketing system in support of internal BMS reporting requests, enterprise change control, and data related enhancements within WV Medicaid. Current effort in around capturing enterprise architecture and systems integration.

*Enterprise Data Services and Data Source Program (07/2020 to present)*

Jim was technical lead for the PMO team focused upon technical details of the solution including working with data warehouse architects to validate system design and ensure systems and security aspects met the needs of the state. In addition, Jim led the data governance aspects of the program.

#### **– West Virginia Department of Human Services (DoHS)**

*People's Access to Help (PATH) DDI Project Management (10/2019 to present)*

As member of the State Program Management Office, Jim served on the Document Review Team. As a team member, Jim reviewed all program artifacts with concentration on operations, architecture, performance testing, and data governance components for the program.

#### **– Iowa Health and Human Services**

*ELIAS Project (01/2024 to 07/2024)*

Jim prototyped a Jira ticketing solution and processes to track enhancements to the IOWA's E&E solution. The tracker captured multi-year needs and approval processes for the organization.

#### **– Massachusetts HIX/IES Entities**

*IV&V Services (05/2014 to 09/2019)*

Jim served as IV&V technical lead for Massachusetts' HIX/IES implementation, with responsibility for CMS formal and boundary testing; blueprint testing; review and validation of major vendor releases; architecture review and other technical content; and engaging with vendors, senior Commonwealth leadership, and architects. During the last 6 months of the project, Jim became head of the IV&V team.

#### **– Maryland Health Benefit Exchange**

*IV&V for Maryland's HBE Implementation (02/2013 to 04/2014)*

As IV&V technical lead, Jim assessed technical aspects of Maryland's HIX/IES implementation, tracked progress, developed risks and issues, innovated traditional IV&V work by creating deep-dive sessions and architecture flows, supported CMS attestations (reports) and Blueprint certifications, served as technical liaison, and worked to build strong relations across various stakeholders and vendors. During the last 4 months of the project, Jim became head of the IV&V



team.

**– Missouri Department of Social Services**

*Missouri Eligibility Determination and Enrollment System (MEDES) IV&V Services (05/2013 to 07/2013)*

Jim conducted a systems architecture review of the MEDES reporting, including high-level infrastructure, data flows, and system artifacts. In addition, he reviewed IBM's systems architecture report, observed required testing activities, and provided feedback as part of the IV&V Monthly Report.

**MetroSource, Corp. (1995 to 2012)**

Jim founded this hybrid consulting and software development company, providing systems architecture, data center virtualization, and business continuity services, including development of systems infrastructure documentation for performance engineering environment for Paychex and an after-hours trading system for Japan to support a high-volume retail equity trading system. Jim also designed and implemented high-availability architecture for AT&T's internet service, WorldNet.

**Rochester Institute of Technology (01/2010 to 12/2011)**

Jim served as the enterprise project manager in building a shared services computing model and the construction of a new green data center facility for one of the largest private universities in the country. In this role, he developed new service processes and chargeback models based on shared services; developed formal RFIs and RFPs; provided budgeting and financial modeling, including return-on-investment assessments; developed a disaster recovery solution; and assessed security infrastructure, including IPS/IDS, security compliance, and firewall.

**Xerox (05/2008 to 06/2009)**

As data center infrastructure architect for the Oracle Competency Center, Jim developed enterprise Service Oriented Architecture (SOA) platform using an Oracle SOA stack; assisted in deploying new enterprise provisioning, alarming, and ticketing services; and conducted a company-wide assessment of VMware infrastructure of Europe and North American data centers. During a 2-year contract, Jim also supported the new vendor IT outsourcing project.

**NYFIX, Inc. (01/2000 to 07/2006)**

As Vice President for Systems and Systems Architecture, Jim was responsible for all new project initiatives, core infrastructure technology, and systems level operations, including management of infrastructure operations, with responsibility for over 65% of all order flow volume to the New York Stock Exchange (NYSE); management of infrastructure security; compliance with Security Exchange Control infrastructure requirements; and management of multiple generations of data center technology change, including three data center migrations.



## Marvin "Ed" Crawford

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



### EDUCATION AND CERTIFICATIONS

Certified HIPAA Professional, ECFIRST

Certified Security Compliance Specialist, ECFIRST

### PROPOSED PROJECT ROLE

General Project Manager

### MEDICAID EXPERIENCE

16 years

Ed brings demonstrated experience in all aspects of Health Information Technology (HIT) security to projects, focusing on policy, research, and analysis and interpretation of laws, rules, and regulations. His experience includes project management services in support of both Design, Development, and Implementation (DDI) and Operations for the WV Medicaid Management Information Systems (MMIS) and Eligibility & Enrollment (E&E) projects. Ed works closely with both the client and vendors to help ensure that applicable systems security infrastructure is in place and provides subject matter expertise in the areas of privacy and security as it relates to systems development and maintenance, architecture, and documentation.

### KEY QUALIFICATIONS

- 16 years of experience directly supporting a single state Medicaid agency, including providing HIT subject matter expertise and project management support
- Extensive experience analyzing relevant Federal security guidelines outlining rules and guidance surrounding the protections, confidentiality, integrity, and availability of electronic protected health information (ePHI) in the context of Enterprise system implementations, maintenance, and operations
- Deep knowledge of HIT-relevant federal security compliance frameworks, including National Institutes of Standards and Technology (NIST) and Minimum Acceptable Risk Standards for Exchanges (MARS-E)

### RELEVANT EXPERIENCE

#### BerryDunn (04/2019 to Present)

– West Virginia (WV) Department of Human Services (DoHS) Medicaid Enterprise Data Solution Implementation and CMS Certification Project (EDS) (07/2021 to Present)

As the systems security lead for the project, Ed provides oversight of privacy and security-related project workstreams. He assists in the development, update, and review processes for security and technical deliverables and helps review and establish documented compliance with system security requirements at the project, Agency, and Federal level.





*People's Access to Help (PATH) DDI Project Management (04/2019 to 09/2021)*

Ed coordinated numerous reviews for 92 separate deliverables, managing intake of all documents from contract vendor, disseminating to internal reviewers, and compiling comments for posting back to Optum. He also administered accurate documentation and tracking of all deliverables to and from the vendor. He was responsible for the review and commentary of the Security, Privacy, and Confidentiality Management Plan, as well as for employing documentation industry best practice processes and methodologies for consistency and traceability.

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

*MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (04/2019 to 10/2021)*

Ed maintains an Access database for the MITA project used for gathering and compiling data during the annual State Self-Assessment, helping to ensure that BMS consistently maintains compliance with its federal partners.

**WV BMS (06/2010 to 04/2019)**

As the HIPAA Security Officer, Ed provided management and operational support services to the state Medicaid agency which included, but was not limited to, Information Technology security controls, system performance monitoring, project management, report administration, and stakeholder engagement. Areas of focus included research, analysis and management of comprehensive IT security policies and procedures for the Medicaid Enterprise (MMIS, DW/DSS and E&E), and all related MITA business process areas. He also provided senior level technical support services for both the Bureau and external staff.

**WV Office of Technology (WVOT) (02/2009 to 06/2010)**

Ed served as an IT client technician, providing project management, coordination, reporting and operational support services for new, and existing, IT implementation activities for the WV Executive Domain. He provided senior-level technical support services for designated Agencies within the Executive Branch.

**WV Office of the Insurance Commissioner (09/2005 to 02/2009)**

As primary HIPAA Security Officer, Ed was responsible for the creation, promulgation, implementation, management and reporting of projects, initiatives, policies and procedures related to accessing the Workers Compensation Insurance System (WCIS) and ICOMP for Federal, State and Outside Access Users. He researched and analyzed relevant Federal security guidelines which specified the rules and guidance surrounding the protections, confidentiality, integrity, and availability of ePHI.

**WV Workers Compensation Commission (12/1999 to 09/2005)**

Ed was the primary information security officer responsible for the creation, promulgation, implementation, and management of the processes, policies and procedures related to the access to WCIS and ICOMP for Federal, State and Outside Access Users. He researched and analyzed relevant Federal security guidelines which specified the rules and guidance surrounding the protections, confidentiality, integrity, and availability of electronic protected health information.

**WV Division of Corrections (12/1995 to 12/1999)**

As Communications Officer, Ed was also the primary designated Information Security Officer responsible for the creation, promulgation, implementation, and management of the processes, policies, and procedures for IT environment at the Mount Olive Correctional Complex.



## Kortney Ester, MBA, CSM

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



Kortney is a Certified Scrum Master with more than seven years of Eligibility and Enrollment and Medicaid experience. She brings excellent communication and presentation skills, which have contributed to successfully coordinating external testing between a state-level Medicaid client and the Centers for Medicare and Medicaid Studies (CMS).

### EDUCATION AND CERTIFICATIONS

MBA, Organizational Management, Mount Vernon Nazarene University

BA, Sociology, Central State University

Certified Scrum Master

### PROPOSED PROJECT ROLE

General Project Manager (GPM)

### MEDICAID EXPERIENCE

3 years

### KEY QUALIFICATIONS

- 11+ years of Medicaid experience, including 3 years contracting with Single State Medicaid Agencies
- 3 + years of experience with project management, and procurement
- 9+ years of experience with CMS-state systems testing

### RELEVANT EXPERIENCE

#### BerryDunn (03/2023 To Present)

Kortney is a Senior Consultant in BerryDunn's Medicaid practice group.

- West Virginia Bureau for Medical Services (BMS) Home and Community-Based Services (HCBS) (02/2025 to present) As a subject matter expert (SME), Kortney researches state and federal Medicaid policies, assist with performance measurement services, waiver applications, and renewals.

#### Medicaid Information Technology Architecture State Self-Assessment (MITA SS-A) (01/2025 to present)

Kortney serves as a SME performing tasks that involve data transmission and quality assurance.

#### Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (03/2023 to present)

As a GPM, Kortney oversees sub-projects, develops and edits contract requirements, conducts research, and helps ensure the quality of deliverables, including the request for proposal.

#### MES Mountain Health Trust (MHT) (12/2023 to 03/2024)

Kortney served as a GPM, overseeing project tasks through completion, conducting research on client inquiries, developing deliverables, and explaining project responsibilities to other SMEs.



*MES Incident and Case Management System (ICMS) Procurement Project  
(03/2023 to 03/2024)*

As a SME, Kortney conducted peer reviews and research.

**– Puerto Rico Medicaid Program**

*Puerto Rico Enterprise Objective Medical Control Services (EOMC) (11/2023 to 02/2024)*

Kortney served as a GPM, for the Puerto Rico Medicaid Program, Puerto Rico's Single State Medicaid Agency, providing interface testing assistance among CMS, Puerto Rico, and CMS's testing vendor. She helped ensure that testing requests and responses were accurate and up to CMS's requirements standards. She also developed testing reports and testing tracking deliverables.

**KPMG, LLP (03/2021 to 03/2023)**

**– TennCare, Tennessee Department of Finance & Administration**

Kortney worked as a Senior Associate (SA) in Advisory and contracted with the Tennessee Department of Finance and Administration, Tennessee's State Medicaid Agency, on the TennCare program. Kortney consistently maintained 100% utilization, accurate timesheets, and schedules. She recorded and edited client-facing meeting minutes, capturing key decisions and action items, provided feedback and next steps to associate-level team members on their work as an engagement Transition Coach and SA, and managed project plan development, project artifacts, performance reporting and tracking, and communication, including testing and procurement items. She also researched, compiled, and analyzed data on other states and entities related to active/potential procurements. Kortney provided ongoing procurement support to a state Medicaid client and participated in daily standup and client-facing meetings as a contributor and observer. She assessed processes and procedures to help ensure the implementation of lean practices, successfully coordinated external testing with a state-level client and CMS, and oversaw a Managed Care Organization's (MCO) test data on behalf of a state-level client. Kortney led CMS Interoperability data exchange transformation testing for a state-level Medicaid client while she also coordinated and facilitated meetings with CMS, clients, and vendors, providing current project updates.

**Franklin County Job & Family Services (08/2015 to 04/2021)**

Kortney served as a Case Manager who determined eligibility for the Supplemental Nutrition Assistance Program (SNAP) (food assistance), Temporary Assistance for Needy Families (TANF) (cash), and various categories of Medicaid, including waiver services, CHIP, pregnant mothers, and Skilled Nursing Facilities. She worked as a front-end SME with vendors on two major state integration and transformation projects, including Ohio Benefits and state telephony enrollment. She utilized various federal and state data systems to verify the information and determine eligibility, interpreted, explained, and applied policy (Ohio Revised Code) to determine applicant eligibility, and complied with all federal and state security and privacy-related laws. Kortney worked independently at the Ohio State University Wexner Medical Center to determine eligibility and coordinate benefits with hospital billing and resources. She analyzed complex back-end eligibility system user issues to quickly find long-term solutions, provided detailed front-end feedback on flawed or inefficient business processes, and worked with Buckeye, Aetna, United HealthCare, and Molina to assist enrollees and help coordinate benefits.

**Walls Wiring (10/2012 to 11/2017)**

Kortney worked as Project Manager to review Requests for Proposals (RFPs) to find new contracts for the company, promote business and services by creating marketing campaigns, and facilitate daily scrum meetings with project teams. She managed projects, evaluated quality and progress, and updated stakeholders. Kortney also mapped business processes and regularly improved them



using lean practices.

**Ohio Public Employee Retirement System (12/2013 to 02/2015)**

Kortney served as a Member Service Representative who provided retirement counseling services to members, enrolled members and their families into healthcare plans with Aetna and other MCOs and maintained retirement accounts and determined retirement eligibility. She liaised with managed care plan organizations, members, and nursing facilities. She created retirement estimates for members, computed members' retirement payments and healthcare costs, and interpreted and applied policy to determine accurate payment amounts and health benefits eligibility.

**Tennessee Department of Human Services (07/2011 to 08/2012)**

Kortney served as Eligibility Counselor and Unit Lead, who interpreted and applied state policy to determine eligibility for Medicaid, SNAP, and TANF. She independently managed a large caseload of individuals and families, used multiple state systems to perform tasks and verify information, and helped implement a new state eligibility system. As a lead, she trained newly hired staff with on-the-job training and provided ongoing support and corresponded with clients through mail, email, phone, and in-person interviews.



## Matthew Oatten

CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

### EDUCATION AND CERTIFICATIONS

BA, Communication,  
Michigan State University

### PROPOSED PROJECT ROLE

Project Management  
Support Staff

### MEDICAID EXPERIENCE

3 Years

Matthew is a problem-solving, results-oriented project manager with five years of experience managing multiple projects simultaneously while following guidelines, deadlines, project budgets, and providing consistent communication to clients. He has proven to take the initiative to generate more efficient practices, and retains strengths in time management, building and maintaining client relationships, and organizational skills. Matthew provides dedicated and outstanding service to clients through effective interpersonal communication, exceeding expectations, and continually developing and improving professionally.

### RELEVANT EXPERIENCE

#### **BerryDunn (07/2022 To Present)**

Matthew is a consultant with BerryDunn's Medicaid Practice Group.

#### **– West Virginia Department of Human Services (DoHS)**

*Medicaid & Children's Health Insurance Program Enterprise System (MCES) Procurement Assistance Project (02/2024 to present)*

Matthew serves the MCES project by providing business analysis and project coordination support. Matthew provides support to the MCES team in various areas including meeting notes, artifact research, tracking project milestones, action items, risks/issues, decisions, and maintaining project budgets. Matthew assists in the development of deliverables for contractual obligations such as monthly status reports, statements of work, and project closeout summaries. He also assists in the development, organization, and process flow of requirements for Joint Requirement Planning (JRP) sessions with the State.

#### *Enterprise Data Solution (EDS) Project (07/2022 to present)*

Matthew serves the EDS project providing business analysis and project coordination support. Matthew provides support to the EDS team in various areas including meeting notes, artifact research, tracking project milestones, action items, risks/issues, decisions, and maintaining project budgets. He also assists in the development of deliverables for contractual obligations such as advanced planning documentation, statements of work, monthly status reports, and project closeout summaries.



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***Medicaid Enterprise System (MES) Purchasing Contract Management Support Subproject (07/2023 to 06/2024)***

Matthew served as the project lead for the MES Purchasing Contract Management Support Subproject, a project focused on process improvement activities for the State. The project assisted in streamlining purchasing processes, researched procurement best practices, and also provided aid to the State in meeting several of its identified purchasing goals.

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

***Forensic Accounting/Auditing Project (05/2023 to 03/2024)***

Matthew served the Forensic Accounting/Auditing project providing business analysis and project coordination support. Matthew provided support to the AHCCCS task order in various areas including meeting notes, tracking action items, helping to keep the client informed, and helping ensure the project met its goals and objectives.

**Concentra Health Services (01/2019 to 06/2022)**

Matthew served as Facilities Coordinator to analyze, prioritize, dispatch, resolve, and follow-up on 80-120 service requests daily. He delegated workload to a team of five project coordinators, designed and maintained a security database for over 500 company locations across 41 states, and collaborated with multiple vendors to resolve time-sensitive, large-scale projects. He researched, evaluated, and bid quotes to proceed with the most cost-effective option while meeting timelines. Matthew established quick mutually beneficial interpersonal relationships with clients and vendors to enhance company productivity, initiated and developed a training manual to assist center managers in effectively working with the Facilities department, and served as interim Facilities Manager in addition to other role to achieve company strategic goal for three months of Manager vacancy.

**Michigan State University Cheer & Dance (08/2018 to 07/2022)**

Matthew worked as Assistant Cheer & Dance Coach to co-manage operations of a D1 athletic team of 80 co-ed athletes. He assessed athlete performance while providing training to develop skill sets in compliance with NCAA and MSU Athletic Department safety protocols. He facilitated travel sporting, marketing, and community events to engage athletes, donors, and fans nationwide.

**Michigan State University (03/2014 to 05/2017)**

Matthew served as Resident Assistant to mentor and support a floor of over 90 on-campus residents. He enforced high standards of safety protocol, policy, and accountability while managing interpersonal relationships. He created, facilitated, and assessed programs to support residents' growth and development both academically and socially.



## Adam "AJ" Mong, M.Ed.

CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



AJ Mong is a flexible and forward-thinking professional with 18 years of combined experience in the mental health, education, and customer service fields. He has developed expertise in written and oral expression, data collection and analyzation, improvement planning, and team leadership.

### EDUCATION AND CERTIFICATIONS

M. Ed., Lancaster Bible College & Graduate School

BS, Lancaster Bible College & Graduate School

### PROPOSED PROJECT ROLE

Project Management Support Staff

### MEDICAID EXPERIENCE

2.5 years

### KEY QUALIFICATIONS

- 18 years of combined experience in the mental health, education, and customer service fields
- Expertise in written and oral expression, data collection and analyzation, improvement planning, and team leadership

### RELEVANT EXPERIENCE

#### BerryDunn (07/2022 to Present)

##### – West Virginia Bureau for Medical Services (BMS)

*Take Me Home (TMH) West Virginia Home and Community-Based Services (HCBS) Quality Initiative (QI) Project (08/2024 to Present)*  
AJ serves the TMH HCBS QI Project by providing business analysis and project coordination support. AJ provides support in areas including data analysis and deliverable creation, budget tracking, and documentation support.

*Medicaid & Children's Health Insurance Program Enterprise System (MCES) Procurement Assistance Project (02/2024 to Present)*  
AJ serves the MCES project by providing business analysis and project coordination support. AJ provides support to the MCES team in various areas including meeting notes, artifact research, tracking project milestones, action items, risks/issues, decisions, and maintaining project budgets. AJ assists in the development of deliverables for contractual obligations such as monthly status reports, statements of work, and project closeout summaries. He also assists in the development, organization, and process flow of requirements for Joint Requirement Planning (JRP) sessions with the state.

##### *Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (07/2022 to 06/2024)*

AJ served the Medicaid Enterprise System Modernization Strategy and Procurement project by providing business analysis and project coordination support.



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*Mountain Health Promise (MHP) Re-procurement project (07/2022 to 09/2023)*

AJ served the MHP Re-procurement project by providing business analysis and project coordination support.

*Mountain Health Trust (MHT) Re-procurement project (09/2022 to 06/2023)*

AJ served the MHT Re-procurement project by providing business analysis and project coordination support.

**Lingle Avenue Elementary School (08/2021 to 07/2022)**

AJ served as an Elementary School Counselor to provide character education curriculum to students while serving as the School Assessment Coordinator for statewide standardized testing. He delivered staff training for security compliances and worked with stakeholders to remove barriers to student learning.

**Frederick Douglass Elementary School (FDES) (09/2013 to 06/2020)**

AJ served as an Elementary School Counselor with the School Leadership Team and Focus School Improvement Team to take FDES from one of the bottom 5% performing schools in the state to a nationally recognized Blue Ribbon School. He collaborated with stakeholders to identify areas of improvement and implement data collection and analyzation processes that would lead to measurable system-wide changes. He developed the Reflection Room suite to service mental health needs for all students with a focus on proactive vs. reactive procedures, trained staff on data entry, and maintained schoolwide behavior database for all professionals to utilize for student growth. Additionally, he worked at the state level as a lead mentor and partnered with other counselors from around the state to score and provide feedback for school counseling plans following the American School Counselors Association model.

**Elizabethtown Area School District (12/2012 to 06/2013)**

AJ served as Long-Term Substitute for an Elementary School Counselor to provide individual and small group counseling, conducted gifted academic screening, and partnered with other counselors to implement a holiday giving program to provide families with meals during the holiday seasons.

**Union School District (02/2012 to 05/2012)**

AJ served as a Long-Term Substitute for an Elementary School Counselor to conduct classroom guidance lessons and facilitated a peer partnership program for elementary students.

**Hershey Entertainment Complex (05/2005 to 08/2013)**

AJ served as Supervisor to lead over 200 employees, including other supervisors, to help operate and maintain the daily procedures and staffing for over a dozen facilities in the Hershey Park Food and Beverage Department. He provided staff training and evaluation, maintained daily inventory and ordering, and tracked labor to help offset cost deficits. AJ also developed individual inspection manuals for all locations, addressed customer service issues and complaints, and resolved them in a manner consistent with the company's values.





## Jonathan Watkins

CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



Jonathan is a consultant with BerryDunn, presenting with a history of working in high pressure, fast-paced roles that require diligence, precise communication, and organization. His consistent and dependable skills in account management and customer service have allowed him to successfully serve clients and companies in the public and private sectors, building strong relationships and successful project outcomes.

### EDUCATION AND CERTIFICATIONS

BS, Criminal Justice, West Virginia University at Parkersburg

### PROPOSED PROJECT ROLE

Project Management Support Staff

### MEDICAID EXPERIENCE

3 years

### KEY QUALIFICATIONS

- Three years' experience supporting a single state Medicaid agency, including experience in procurement, Managed Care Organization (MCO) onboarding, MES Modernization, Home and Community Based Services (HCBS), and risk assessment and management
- More than 10 years' experience with coordination, organization, and management
- Expertise in written and oral expression, data collection and analyzation, improvement planning, and team leadership

### RELEVANT EXPERIENCE

#### BerryDunn (11/2021 to Present)

– West Virginia (WV) Department of Human Services (DoHS)  
*Purchasing Support (11/2024 to Present)*

Jon provides project coordination and monitors project risks and issues in support of the Office of Procurement Services to streamline purchasing efforts across various procurement projects. Jon's work helps to keep the client informed and helps ensure the project meets its goals and objectives.

*ARPA HCBS Implementation Plan Project (09/2024 to Present)*

Jon provides project coordination and monitors project risks and issues to assist the client with management and facilitation for the WV ARPA HCBS Implementation Plan Project when needed. Jon's work helps to keep the client informed and helps ensure the project meets its goals and objectives.

*Programmatic Managed Care Support Project (06/2024 to Present)*

Jon provides project coordination and monitors project risks and issues to assist the client with management and facilitation for the Programmatic Managed Care Support Project when needed. Jon's work helps to keep the client informed and helps ensure the project meets its goals and objectives.



***Medicaid and CHIP Enterprise System (MCES) Project (11/2021 to Present)***

Jon provides project coordination and monitors project risks and issues to assist the client with management and facilitation of the MCES Project, working closely with Bureau for Medical Services (BMS), WV's single state Medicaid agency. Jon helps to keep the client informed and helps ensure the project meets its goals and objectives.

***Mountain Health Trust (MHT) MCO Procurement Assistance Project Phase II (11/2023 to 08/2024)***

Jon provided project coordination and monitored project risks and issues to assist the client with management and facilitation of MCO procurement and onboarding activities for MHT. Jon's work helped to ensure the State has a detailed Request for Proposal (RFP) and a successful procurement for MCO services, along with onboarding support for the chosen vendor.

***People's Access to Help (PATH) (11/2023 to 02/2024)***

Jon provided project coordination and monitored project risks and issues to assist the client with management and facilitation for the WV PATH Project when needed. Jon's work helped to keep the client informed and helped ensure the project met its goals and objectives.

***Certified Community Behavioral Health Clinic (CCBHC) (11/2023 to 12/2023)***

Jon provided project coordination assistance and monitored project risks and issues to assist the client with management and facilitation for the WV CCBHC Project when needed. Jon's work helped to keep the client informed and helped ensure the project meets its goals and objectives.

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

Jon provided project coordination and monitored project risks and issues to assist the client with management and facilitation for BMS and the LIAP Project. Jon helped to keep the client informed and helped ensure the project met its goals and objectives.

***Incident and Case Management System (ICMS) Procurement Project (09/2022 to 06/2023)***

Jon provided project coordination and monitored project risks and issues to assist the client with management and facilitation of the ICMS procurement. Jon's work helped to ensure the State has a detailed RFP and a successful procurement for ICMS services.

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

Jon provided project coordination and monitored project risks and issues to assist the client with management and facilitation of MCO procurement and onboarding activities for MHT. Jon's work helped to ensure the State has a detailed RFP and a successful procurement for MCO services, along with onboarding support for the chosen vendor.

***Public Health Emergency (PHE) Support Project (12/2021 to 12/2022)***

Jon provided project coordination and monitored project risks and issues to assist the WV DoHS with temporary flexibility that provides services to different beneficiaries during PHE. Jon's work helped to keep the client informed and helped ensure the project met its goals and objectives.

***Mountain Health Promise (MHP) Re-Procurement Project (11/2021 to 11/2022)***

Jon provided project coordination and monitored project risks and issues to assist the client with management and facilitation of MCO procurement activities for MHP. Jon's work helped to ensure the State had a detailed RFP and a successful procurement for MCO services, along with onboarding support for the chosen vendor.

***Mental Health Parity Project (01/2022 to 06/2022)***

Jon provided project coordination and monitored project risks and issues to assist the client with management and facilitation for the BMS and Children's Health Insurance Program (WVCHIP) Mental Health Parity and Behavioral Health Support Project. Jon helped to keep the client informed and helped ensure the project met its goals and objectives.



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**CAMC Hospital (1/2021 to 11/2021)**

Jonathan worked as an admitting clerk to schedule and coordinate both inpatient and outpatient cases which included registering patients, verifying insurance, billing, and customer service. In addition, he organized the day-to-day needs of the unit and performed basic bookkeeping duties.

**Greenhills Country Club (05/2012 to 12/2020)**

Jon worked in administration to schedule and organize golf tournaments for the country club. This included coordination with the PGA Professional and all parties involved with the tournament. He was also responsible for organizing, taking minutes, and processing documents related to Board Meetings. His duties also included recruiting new members and employees, training new hires, day-to-day bookkeeping duties, and invoicing.

**Jackson County 911 (01/2020 to 12/2020)**

Jon worked as a dispatcher to receive and dispatch all emergency and non-emergency calls for EMS, Law enforcement and Fire for the County. This role required the multitasking of multiple calls per minute, operating both radio and telephone console, and heavy documentation of the recording per call.



## Hailey Holden

STAFF CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



Hailey is a leadership-driven professional with more than 10 years of 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 and brings a variety of skills such as timeline management, schedule deconflicting, client-contractor coordination, personnel and resource management, data and project management, event planning and marketing, recruitment, and process improvement.

### EDUCATION AND CERTIFICATIONS

BA, Psychology, Purdue University

### PROPOSED PROJECT ROLE

Project Management  
Support Staff

### MEDICAID EXPERIENCE

2 Years

### KEY QUALIFICATIONS

- Over 10 years of experience providing solution-focused coordination
- Over 5 years of successful development, design, and implementation of business processes, education, and training

### RELEVANT EXPERIENCE

#### **BerryDunn (07/2022 To Present)**

Hailey is a consultant for BerryDunn's Medicaid Practice Group. Hailey supports a variety of practice group initiatives, including supporting the BerryDunn Medicaid Learning Center, West Virginia Operations Improvement Team, and Medicaid Practice Group Resource Library.

#### **– West Virginia Bureau for Medical Services (BMS)**

*West Virginia Engagement Coordinator (07/2022 to present)*

As the Engagement Coordinator, has supported BerryDunn leadership in creating change across the varied projects within the engagement and provided a fresh perspective for improving internal and client processes emphasizing quality and consistency. Hailey has led the engagement in process automation, assisting with the design and implementation and corresponding training for several enterprise applications, to increase ease of access and productivity. She has designed and maintains a variety of trackers, budgets, and data stores for use across the engagement, promoting an organized and efficient approach for enterprise management. Hailey manages and processes staffing requests and service level agreements for the engagement, ensuring data quality and accurate reporting.

*Organizational Development (OD) Project Phase II (06/2024 to present)*

Hailey provides subject matter expertise in instructional design and training. She supports the development of onboarding and training eLearning courses for the Bureau for Medical Services.



*Advanced Planning Document (APD) Support Project (05/2023 to present)*

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

*Partnership Management Support Project (12/2023 to 06/2024)*

Hailey assisted with leverage and reuse initiatives and provided project management support.

*Provider Management Support Project (01/2023 to 10/2023)*

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

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

Hailey served as an Adolescent Lead Social Caseworker IV to provide intensive casework services to families and children. She developed productive working relationships with reluctant clients, establishing positive rapport and creating collaborative partnerships between all involved parties. Hailey successfully identified the needs of clients to create and implement solution-focused plans of action to meet and exceed client needs. Additionally, Hailey helped to ensure the successful completion of short- and long-term goals by monitoring and documenting progress toward client goals. She conducted research, investigation, and strategic decision-making to help ensure proper reporting, prosecution, and handling of child abuse and neglect reports. Hailey also performed assessments of new cases, referred clients to appropriate resources, and provided accurate updates and testimony in court hearings and mediations. Her efforts resulted in a substantial decrease in repeat infractions. During her tenure Hailey acted in a supervisory role to members of the casework team, providing feedback, continuous education, and training to other caseworkers.

**Lake County Court Appointed Special Advocate (CASA) Program (04/2016 to 04/2021)**

Hailey served as a Lake County CASA who advocated for the best interests of abused and neglected children involved in child welfare proceedings. She provided representation and testimony in open court on behalf of the client's best interest, collaborated with the local Department of Child Services and service providers, and led and trained volunteers to properly conduct case management supporting the best interests of clients. Hailey played an integral in the development of the organization. She worked alongside program leadership for annual goal setting and tracked the completion of milestones, facilitating the organization's strategic goals. Hailey pioneered creative strategies for the recruitment, training, and management of over one hundred community volunteers. Hailey conducted an extensive analysis of program training content and protocols and transformed an outdated in person training protocol into a tailored and refreshed eLearning program to continue the training of community volunteers during the COVID-19 pandemic. She also initiated the conversion of physical client files and demographic information to a secure web-based data store and case management system, allowing for the compilation of statistical data that best represented the organization. Her contribution allowed for a marked increase of both state and national grant funding for the program. Additionally, Hailey planned and conducted education-focused community outreach events, developed and implemented marketing plans for recruitment, and designed refreshed marketing materials for the program to increase community education and awareness.

**Second Chance for Pets Network (01/2015 to 01/2017)**

As a member of the Board of Directors, Hailey provided oversight to help meet the organization's strategic goals, and managed strategies for the recruitment, training, and management of volunteers. She evaluated business and fiscal plans to help ensure the proper running of the organization, organized social media campaigns, and hosted fundraisers for over four hundred people.



## Cate Poling

CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

### EDUCATION AND CERTIFICATIONS

BA, emphasis in English Literature, Marshall University

Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT + MCMP II)

Poynter ACES Certificate in Editing

### PROPOSED PROJECT ROLE

Project Management Support Staff

### MEDICAID EXPERIENCE

3.5 Years



Cate is a knowledgeable researcher and writer with extensive 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. Cate transitioned from clinical practice work to working with single state Medicaid agencies in support of health and human services projects and initiatives, and her attention to detail allows her to be an invaluable resource for drafting and interpretation of federally-mandated documentation and funding requests, deliverables, Requests for Proposals (RFPs), meeting agendas and notes, and other project documentation. She presents a well-developed understanding of project and system requirements as relates to Medicaid Enterprise system privacy and security architecture and standard security frameworks, such as National Institute of Standards and Technology (NIST) 800-53 and Minimum Acceptable Risk Standards for Exchanges (MARS-E). She demonstrates proficiency with Microsoft, Google, and Atlassian tool suites. Additionally, Cate works to promote quality and inclusivity in language, communication, and the workspace as a Poynter ACES certified editor and co-chair of one of the firm's Employee Resource Groups (ERGs).

### KEY QUALIFICATIONS

- Extensive experience with drafting, preparation of, review cycles, and submission of key client service deliverables, including executive and Centers for Medicare & Medicaid Services (CMS) status reports, Scopes of Work (SOWs), Advance Planning Documents (APDs), and Requests for Proposals (RFPs)
- Over three years of experience providing research and business analysis support to a single state Medicaid agency for large-scale enterprise system implementation and maintenance and operations projects

### RELEVANT EXPERIENCE

#### BerryDunn (06/2021 to Present)

As a consultant, Cate supports a variety of critical West Virginia (WV) and Iowa (IA) state Medicaid agency projects and initiatives across various realms, 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 WV client needs and deliverables.

– **Iowa Health and Human Services (HHS)**

*Eligibility Integration Application Solution (ELIAS) Project (01/2025 to Present)*

As the schedule management lead, Cate supports the project team and State throughout the enhancement of its eligibility system change management and SDLC processes and procedures.

– **West Virginia Bureau for Medical Services (BMS) (06/2021 to Present)**

*Systems Development Lifecycle Coordination Project (06/2024 to Present)*

As project manager, Cate supports the transition of the Data Improvement Project (DIP) body of work, working with the technical advisory and change management team subject matter experts (SMEs) to help align SDLC activities across all BMS vendors and data suppliers. Cate facilitates meetings between BerryDunn, State, and vendors 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 manages the project team working together to support the State's use of an integrated change management tracking tool and to help promote efficiency and transparency in enterprise SDLC activities by establishing an orderly and effective procedure for tracking the submission, coordination, review, evaluation, and implementation of all system-related changes.

*Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project (06/2021 to 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.

*DIP Phase IV (06/2023 to 06/2024)*

As a project manager, Cate assisted with refining, expanding, and initiating the DIP systems development life cycle (SDLC) body of work and preparing for the transfer of the work to the SDLC Coordination Project. She oversaw the successful closure of the project, for which she had oversight responsibilities including 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 facilitated meetings between BerryDunn, State, and vendors to help track DIP efforts, including those related to T-MSIS needs and State reporting needs, reviewed meeting notes, agendas, and monthly status reports, and helped draft and refine project deliverables. Cate also assisted with WV engagement hours and resource planning oversight within this role.

– **West Virginia Department of Human Services (DoHS) (06/2021 to Present)**

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



Cate provides subject matter expertise to assist in development and refinement of technical requirements to support the State in defining desired outcomes for MCEs module procurement(s), including specifications related to systems privacy and security compliance and technical and organizational processes.

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

As a consultant for the PATH project, Cate has a variety of responsibilities, which include providing project coordination support, researching and developing process flows, following up on action items, assisting with change management processes and procedures, scheduling meetings to help ensure adherence to project schedule, and providing quality control for meeting materials to satisfy the contract Service-Level Agreements (SLAs).

*Business Intelligence (BI) and EDS Independent Security Assessment Project (05/2023 to 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.

**Jackson County Solid Waste Authority (SWA) (09/2024 to Present)**

As a County-Commission elected appointee, Cate sits on the Jackson County, WV SWA board, established by WV Code §22C-4-3 to help protect public health and welfare by establishing a comprehensive program of solid waste collection, processing, recycling, and disposal. Cate works alongside SWA board members to evaluate key county SWA issues, outreach needs, and project initiatives, including those related to staffing sourcing and maintenance, community engagement, and grant program funding evaluation and application, especially as relates to the county's recycling program management and community waste collection initiatives.

**Mountain State Eye Associates (04/2017 to 06/2021)**

Cate was a Certified Ophthalmic Assistant who provided direct assistance to MDs and ODs in a busy ophthalmic practice with providers who diagnose and treat ocular diseases, provide in-office minor surgical procedures, and provide pre- and post-op care for cataract surgery patients. 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 had updated, accurate HIPAA-compliant registration forms on file; and helped ensure all electronic medical record (EMR) systems reflected correct patient information. She assisted with administrative, clerical, patient service, and operational support duties daily.

**PacificSource Health Plans (09/2015 to 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 to 09/2015; 05/2009 to 01/2012)**

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

From 2009 to 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.

**Highmark WV Blue Cross Blue Shield (BCBS) (10/2012 to 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. Cate 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 to 10/2012)**

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



## Kourtney Kirk

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

### EDUCATION AND CERTIFICATIONS

BS, Business  
Administration –  
Marketing, Glenville State  
University

Medicaid Learning Center  
(MLC) Certified Medicaid  
Professional (HIT + MCMP  
II)

### PROPOSED PROJECT ROLE

Project Management  
Support Staff

### MEDICAID EXPERIENCE

3 Years

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 (SOWs) 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.

### KEY QUALIFICATIONS

- Extensive experience with preparation of, review cycles, and submission of key client service deliverables, including executive and Centers for Medicare & Medicaid Services (CMS) status reports, SOWs, Advance Planning Documents (APDs), and Requests for Proposals (RFPs)
- 3 years expertise in cultivating, coordinating, and managing relationships between interested and invested parties to help secure successful project outcomes

### RELEVANT EXPERIENCE

#### **BerryDunn (10/2022 to Present)**

Kourtney is a senior consultant with BerryDunn's Medicaid Practice Group. Kourtney provides support to the Bureau for Medical Services (BMS), West Virginia's (WV) Single State Medicaid Agency, as well as other State departments and agencies that work closely with Medicaid and Integrated Eligibility Services.

#### **– West Virginia Department of Health Facilities (DHF)**

*WV Department of Health Facilities Request for Proposal Vendor  
Selection Assistance Services (01/2025 to Present)*

As a project coordinator and business analyst supporting the WV DHF, Kourtney has a wide range of project duties.



She creates agendas and maintains meeting schedules and provides quality control for meeting materials to satisfy contract Service Level Agreements (SLAs). She maintains project information and tracks action items, risks, issues, and decisions, in addition to developing and distributing meeting minutes.

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

As a project coordinator and business analyst supporting the WV DoHS, Kourtney has a wide range of project duties. She creates agendas and maintains meeting schedules and provides quality control for meeting materials to satisfy contract Service Level Agreements (SLAs). She maintains project information and tracks action items, risks, issues, and decisions, in addition to developing and distributing meeting minutes for the following projects:

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

– **WV BMS**

As a project coordinator and business analyst supporting the WV BMS, Kourtney has a wide range of project duties. She creates agendas and maintains meeting schedules and provides quality control for meeting materials to satisfy contract Service Level Agreements (SLAs). She maintains project information and tracks action items, risks, issues, and decisions, in addition to developing and distributing meeting minutes for the following projects:

- Systems Development Life Cycle (SDLC) Coordination Project (06/2024 to Present)
- Information Technology Control Environment Project (06/2024 to Present).

*Medicaid Enterprise Data Solution Implementation and CMS Certification Project (08/2020 to 01/2022; 10/2022 to present)*

As the lead coordinator for the EDS Project, she assists in the creation and maintenance of 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 to 10/2023; 11/2024 to Present)*

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

*Medicaid & Children's Health Insurance Program Enterprise System (MCES) Procurement Assistance Project (08/2020 to 01/2022)*

As a project coordinator for PATH, the Enterprise Data Solution (EDS), and MCES projects, Kourtney has a wide range of project duties. She creates agendas and maintains meeting schedules and provides quality control for meeting materials to satisfy contract 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 APDs, project deliverables, and budgets, creates monthly status reports, and maintains project rosters for the PMO, client, and vendors. As a project consultant, she assists with research communication needs across various project workstreams.

**Tek Systems (03/2021 to 01/2022)**

As a subcontractor through Tek Systems with BerryDunn, Kourtney created agendas and



maintained meeting schedules for the WV Department of Human Services, IBM® Watson Health, and BerryDunn. She created agendas and maintained meeting schedules and provided quality control for meeting materials to satisfy contract SLAs. She maintained project information and tracked action items, risks, issues, and decisions, in addition to developing and distributing meeting minutes.

**N3 (03/2018 to 11/2018; 08/2019 to 08/2020)**

*Business Development Representative and Scheduling Coordinator (08/2019 to 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 to 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 also managed client relationships.

**Total Quality Logistics (11/2018 to 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 College (GSC) (08/2017 to 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.



## Shandia Benke, IIBA™ ECBA™

CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



### EDUCATION AND CERTIFICATIONS

BA, History, Columbia College

Entry Certificate in Business Analysis™ (ECBA™)

International Institute of Business Analysis (IIBA™) Member

### PROPOSED PROJECT ROLE

Project Management Support Staff

### MEDICAID EXPERIENCE

7 Years

Shandia Benke is a certified consultant with over 14 years of experience successfully supporting and leading projects across a multitude of industries, including financial services, education, and government health programs. Shandia specializes in Instructional design, e-learning development, business analysis, process improvement, creative problem-solving, and gap identification. With her strong background in education and training, Shandia delivers solutions and provides valuable expertise, making her a trusted resource among clients.

### KEY QUALIFICATIONS

- Over 20 years in education
- Over 14 years of project support across a range of industries
- Over 7 years' experience developing and leading training and onboarding
- Over 6 years' experience working with Single State Medicaid agencies
- Over 6 years of office management
- Over 5 years of SharePoint document management
- Over 4 years certification support for Missouri Department of Social Services
- 1 year experience creating E-learning courses in Articulate products
- 1 year experience working in a learning management system (LMS)
- Proficient in Camtasia
- Skilled in facilitating meetings, researching, synthesizing data, tracking, and reporting
- Excellent written and verbal communication skills
- Accomplished in all Microsoft Office products

### RELEVANT EXPERIENCE

#### BerryDunn (04/2018 To Present)

– Iowa Department of Health and Human Services (DHHS) Quality Management System (QMS) Minimum Viable Product (MVP) 2 Project (01/2025 to present)

Shandia is providing business analysis support and subject matter expertise.



– **West Virginia Department of Human Services (DoHS)**

*Engagement Coordination Support (01/2025 to present)*

Shandia provides review and tracking support for the engagement's statements of work (SOW).

*Organizational Development (OD) Project Phase II (07/2024 to present)*

Shandia is leading and executing the creation of four e-learning onboarding and training courses for the client.

*Programmatic Managed Care (MC) Support (06/2024 to present)*

Shandia completed the design and creation of four e-learning training courses and is providing coordination support for the project.

*Mountain Health Trust (MHT) Phase II Project (02/2024 to 06/2024)*

Shandia led and executed the design and creation of four e-learning training courses.

*People's Access to Help (PATH) Project (05/2023 to 06/2024)*

Shandia provided project coordination support and onboarding/training expertise.

– **Missouri Department of Social Services**

Shandia supported the MME PMO through three implementation projects from start-up to certification and project closure. She not only provided document management, meeting facilitation, analysis, and metrics, but she improved client process and structures, led JAD sessions, and conducted User Acceptance Testing (UAT).

- *Missouri Medicaid Enterprise (MME) Project Management Office (PMO) Engagement Electronic Visit Verification (01/2021 to 05/2023)*
- *MME PMO Program Integrity (02/2019 to 01/2021)*
- *MME PMO Business Intelligence Solution – Data Warehouse Enterprise (04/2018 to 02/2019)*

– **Internal Projects**

*Medicaid Learning Center (05/2024 to present)*

Shandia is leading and executing the redesign of dozens of Medicaid e-learning courses.

*WV Engagement Operations Improvement Team (09/2023 to present)*

Shandia co-led the build out of the engagement's internal SharePoint Resource Library.

*EQA Champions (09/2023 to 09/2024)*

Shandia played a key role in modifying and improving EQA processes.

*Business Analysis Community of Practice (BACOP)*

Shandia is co-leading the practice group and its initiatives.

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

As the membership and special events coordinator, Shandia provided administrative support through document and database management and event planning and coordination.

**United Landscape Design (2017)**

As an office administrator, Shandia led the design and implementation of organizational and systematic process and structure change within the company to increase efficiency, promote efficacy, and support the goals and visions of the business.

**Lighthouse Preparatory Academy**

*Office Manager (2015 to 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



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payroll, and financial issues; maintained office records; and conducted meetings with Academy staff.

*Teacher (2012 to 2016)*

In her role as an educator at Lighthouse Preparatory Academy, a university-model school, Shandia developed course curriculum, created class lessons, and taught subject matter for classes in literature, language, and logic; English composition; and psychology, among others.

*Dean (2012 to 2015)*

In her role as a Dean at Lighthouse Preparatory Academy, she developed and provided training and onboarding for all families and teachers — new and existing.



## Alycia Minshall, MA

DOCUMENTATION SPECIALIST

Berry, Dunn McNeil & Parker, LLC



Alycia Minshall is an editing and communications professional with more than 15 years of experience in higher education and corporate settings. She excels in copywriting, editing, and collaborating on deliverables.

### EDUCATION AND CERTIFICATIONS

MA, English Language and Literature, Central Michigan University

BA, English, Alma College

Poynter ACES Certificate in Editing

### PROPOSED PROJECT ROLE

Project Management Support Staff

### RELEVANT EXPERIENCE

16 years

### PROJECT EXPERIENCE

#### BerryDunn (08/2022 to Present)

Alycia works with the BerryDunn team in West Virginia to offer documentation support, including copyediting, proofreading, and formatting services for deliverables. She also develops and delivers presentations on various writing topics such as creating accessible documents; integrating diversity, equity, and inclusion principles into writing; and using PerfectIt to self-edit.

#### Alycia Minshall Editing Services (03/2014 to present)

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

#### Public Sector Consultants (04/2017 to 8/2021)

##### – Senior Editor (06/2020 to 08/2021)

As senior editor, Alycia wrote copy for various mediums, including websites, social media, 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 ensure consistency in voice, brand, and tone across messaging channels and that all materials are well written, accurate, properly researched, objective, and concise. 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 (04/2017 to 06/2020)**

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; and meeting notes. She helped ensure materials were, accurate, objective, concise, and consistent in voice, brand, and tone across messaging channels.

**University of Southern California Graduate School of Social Work (09/2015 to 06/2016)**

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 (08/2013 to 06/2014)**

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 (01/2012 to 06/2014)**

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 (08/2008 to 12/2011)**

– **Student Director (08/2010 to 12/2011)**

Alycia supervised and managed seven employees, worked closely with the faculty director to properly staff the center, coordinated on-campus presentations, and conducted monthly staff meetings. She created weekly work schedules for staff, scheduled and delivered writing center orientations, and managed monthly payroll submissions.

– **Writing Center Tutor (08/2008 to 12/2011)**

Alycia tutored and collaborated with undergraduate students on class assignments, resumes, and graduate school application essays to improve their writing. She also delivered writing center orientations across campus.



## Samuel Kessler

CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



Samuel Kessler is an experienced customer service professional, bringing seven years of quality performance in related roles. He is skilled in mentoring team members to deliver exceptional service and building team morale through effective communication and positive performance feedback. His skills include market strategy and management, research and due diligence, pipeline development, business development, and quality assurance.

### EDUCATION AND CERTIFICATIONS

BS, Marketing, West  
Virginia Wesleyan College

### PROPOSED PROJECT ROLE

Project Management  
Support Staff

### MEDICAID EXPERIENCE

4 years

### RELEVANT EXPERIENCE

#### **BerryDunn (08/2020 to Present)**

– West Virginia Department of Human Services (DoHS)

*People's Access to Help (PATH) (08/2020 to Present)*

As Deliverables Lead Samuel manages contract deliverables from the training, testing, functional, technical, certification, and operations areas. As such he manages the production of the Design, Development, and Implementation (DDI) and Maintenance and Operations (M&O) deliverables by working collaboratively with the vendor and the client to produce, review, and approve each contract document as it relates to the system. He implements quality controls to ensure that the documents reflect functionality within the system, and works with the vendor and the client to address any gaps.

*Children with Serious Emotional Disorder (CSED) project (08/2020 to 12/2022)*

Samuel was a project coordinator for both of the above projects. He had a variety of responsibilities, which included organizing daily meetings for team organization, overseeing daily project coordination activities, developing process flows and scheduling meetings to help ensure adherence to project schedule, providing quality control for meeting materials to satisfy the contract Service-Level Agreements (SLAs). In addition, as part of the CSED project, Samuel tracked decisions, interfaced with vendors, assisted with the drafting of reports, and supported the project team in a variety of functions.



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**N3 LLC (05/2018 to 08/2020)**

Working alongside IBM, Magento, Adobe, and Microsoft, Samuel managed the accounts for SMB/Enterprise level businesses and connected potential and existing customers to senior level account executives. For IBM, this was focused on DB2 and VMware adoption. For Magento and Adobe, this was focused on eCommerce Management Platforms. For Microsoft, Samuel assisted Azure customers with billing and technical issues in an account management position. After Azure, he drove Teams adoption and utilization as part of the Modern Workplace Team as an I-CSM.

**Target (06/2017 to 01/2018)**

As an electronics sales floor associate, Samuel helped guests with education on devices and products, answering questions, and making sure that each guest's needs were taken care of.

**Trojan Landing LLC (05/2013 to 08/2016)**

As a marine salesperson for Trojan Landing LLC, Samuel assisted customers with their personal recreational vehicle needs, making sure to match each customer with the right product for them. He took them through purchase, title, and financing, and assisted with maintenance and storage needs afterwards. As marketing director, he handled all online sales, digital and print marketing, and event planning and marketing.



## Caitlin Cabral

DOCUMENTATION SPECIALIST

Berry, Dunn, McNeil & Parker, LLC



### EDUCATION AND CERTIFICATIONS

BA, Psychology, University of Hartford

Poynter ACES Certificate in Editing

### PROPOSED PROJECT ROLE

Project Management Support Staff

### RELEVANT EXPERIENCE

5 years

Caitlin Cabral is a Poynter-ACES-certified member of the BerryDunn Editorial/QA team who has demonstrated experience in project management, copyediting, and teaching others business writing skills. She is a self-motivated learner with a strong academic history and the ability to master several roles in the workplace.

### PROJECT EXPERIENCE

#### BerryDunn (09/2021 To Present)

As a member of BerryDunn's Editorial/QA (EQA) team, Caitlin is responsible for proofreading and copyediting meeting notes, memos, reports, and PowerPoint presentations for various projects. This requires helping to ensure that documents conform to BerryDunn's formatting and writing standards as outlined in the BerryDunn Style Guide. Caitlin trains new teammates and creates and presents educational materials to the Consulting Team about various aspects of business writing. She helps to maintain the Style Guide and continuously improve EQA's service offerings.

#### QualityMetric (08/2020 to 09/2021)

Caitlin worked as a project research assistant and acted as project manager on several concurrent projects, with responsibilities including timeline management, client communications, and supervision of vendors. She provided administrative support to project teams by taking meeting minutes, scheduling calls, processing invoices, and quality-checking materials. She also served as the Deliverable Tracking Manager, which entailed maintaining detailed records and proper storage of deliverables for all ongoing projects. Caitlin was also responsible for copyediting proposals and deliverables for spelling, grammar, fluency, and consistency.

#### University of Hartford Department of Psychology (01/2019 to 05/2020)

Caitlin worked as a research assistant to aid in running experimental sessions by overseeing the distribution and collection of materials. She facilitated timely data processing by efficiently scoring participant response booklets with colleagues and maintained the integrity of experimental sessions by managing participant entry.



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**True Colors, Inc. (01/2019 to 05/2019)**

Caitlin worked as an intern to supervise vendors at the True Colors Annual Conference, which is the largest consistently run LGBTQ+ youth conference in America. She coordinated check-in and check-out, responded to vendor needs, and directed guests. She also secured donations, identified potential donors, established correspondence, and facilitated donation process. Caitlin redesigned presentation materials to best represent True Colors' current mission and achievements.

**University of Hartford Department of Communication (09/2018 to 05/2020)**

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



## Carole Ann Guay

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



### EDUCATION AND CERTIFICATIONS

BS, Accounting, University of Southern Maine

### PROPOSED PROJECT ROLE

Project Management Support Staff

### RELEVANT EXPERIENCE

9 years

Carole Ann Guay is a senior consultant for BerryDunn's Consulting Services Project Support group. She has over eight years' experience as a project coordinator and technical analyst and workflow developer. She has provided support services such as workflow and dataflow diagrams, document requests, status reports, meeting requests, and data management. She has also worked to help ensure business assessments are compliant with federal regulations and provided documentation support and deliverable assistance on numerous projects.

### RELEVANT EXPERIENCE

#### **BerryDunn (10/2014 to Present)**

Carole Ann supports BerryDunn's Consulting team with the compilation and reviews of project deliverables, developing high quality visual aids, and workflow documentation.

#### **– Puerto Rico Medicaid Program**

*Enterprise Objective Monitoring and Control (09/2023 to present)*

Carole Ann assists with review and updates of deliverables.

#### **– Maine Department of Corrections**

*Offender Management System (OMS) Selection (11/2021 to present)*

Carole Ann developed high-level workflow diagrams for the BerryDunn team assessing business processes, crafting cost benefit analyses, developing a Request for Proposal (RFP), and assisting the DOC with its selection of a new OMS.

#### **– Ellis County, TX**

*Computer-Aided Dispatch/Records Management System (CAD/RMS) and Jail Management System (JMS) Replacement (06/2021 to present)*

Carole Ann coordinates document request items, status reports, meeting requests, and data management and has been involved in all phases of the project.



### **Vermont Department of Vermont Health Access**

#### *Vermont Health Connect Financial and Programmatic Audit (01/2016 to present)*

BerryDunn has performed the State's financial and programmatic audit of its Health Insurance Exchange for FYE 6/16 and is in the process of performing the FYE 6/23 audit. Carole Ann currently serves as the project coordinator on this audit to determine whether the exchange is in material compliance with 45 CFR 155.

#### **– Minnesota Health Benefit Exchange (MNSure)**

##### *Programmatic Audit (10/2015 to present)*

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

#### **– Monroe County, FL**

##### *Clerk and Court Business Process Review (02/2023 to 02/2024)*

Carole Ann developed high-level workflow and dataflow diagrams for the BerryDunn team assisting the County Clerk's Office with documenting its business processes for the purposes of identifying and removing barriers to efficiency. At the project's outset, there was a gap in institutional knowledge and a lack of formalized and documented administrative and court processes. BerryDunn helped to bridge that gap by holding cross-divisional meetings with stakeholders to openly discuss process challenges and increase communication.

#### **– City of St. Charles, MO**

##### *Enterprise Resource Planning (ERP) System Selection Project (09/2023 to 10/2023)*

Carole Ann assisted in the analysis of vendor proposals and requirements analysis to assist in vendor selection.

#### **– Arizona Department of Agriculture (AZDA)**

##### *Licensing System Assessment (12/2022 to 07/2023)*

Carole Ann developed high-level workflow diagrams for the BerryDunn team performing an assessment of AZDA's licensing systems. The study concluded with a report which outlined the current state of the licensing system, analyzed the current landscape of agricultural licensing systems and peer states' approaches, provide recommendations for next steps, laid out an implementation roadmap, and provided a task order scope of work for AZDA's IT Modernization Strategic Initiative.

#### **– Montana Department of Corrections (MDOC)**

##### *OMS Selection and Implementation (01/2023 to 07/2023)*

Carole Ann assisted with the development of high-level workflow diagrams for the BerryDunn team providing a review of MDOC's business processes and technology. By the end of the project, the MDOC had a clear vision of how to improve the technology and business processes for a modern offender management solution.

#### **– Metropolitan Government of Nashville and Davidson County (Metro), TN**

##### *Information Security Program Development (05/2016 to 04/2021)*

For Metro's, development of their Information Security Management Program, Carole Ann worked as a project coordinator, assisting in the development of findings reports. In addition, she served as part of the team performing a Payment Card Industry (PCI) Readiness Assessment. These activities included identifying Metro's current state of PCI, identifying where PCI data resides and where it



traverses the network.

– **New Mexico Corrections Department (NMCD)**

*COTS OMS Replacement (11/2016 to 06/2020)*

Carole Ann compiled weekly status reports and participated in interviews as well as survey analysis for the BerryDunn team providing high-level requirements gathering and definition services. BerryDunn also assisted with developing and managing the RFP process through vendor negotiation and facilitated developing detailed OMS requirements with NMCD staff and the selected OMS vendor.

– **Oregon Enterprise Technology Services (ORTS)**

*Integrated IT Service Management (ITSM) (03/2018 to 03/2019)*

Carole Ann developed workflow and dataflow diagrams through on-site meetings as well as conference call sessions for the BerryDunn team providing business analysis services in support of its ITSM system project. The purpose of the ITSM system project was to provide efficiency and effectiveness enhancements that could lead to the OR ETS providing greater value to its customers.

– **Colorado Office of the State Auditor**

*IT Evaluation (09/2017 to 02/2019)*

Carole Ann coordinated document request items, status reports, meeting requests, and data management for the BerryDunn team evaluating the State's IT programs, processes, and resources. The BerryDunn team's recommendations served to help the State's IT program align its centralized structure with the General Assembly's goals for daily IT operations, improve the process for evaluating and prioritizing IT projects, increase opportunities to interface with Colorado citizens through existing and new technologies, interface with additional agencies, and understand the level of satisfaction and improved services to customers.

– **Sacramento Municipal Utility District (SMUD)**

*Information Security Audit (08/2016 to 12/2017)*

Carole Ann provided documentation support and deliverable assistance for SMUD's Information Security Audit.

– **West Virginia Department of Human Services**

*Eligibility and Enrollment Independent Security and Privacy Controls Assessment (01/2017 to 07/2017)*

Carole Ann served as an analyst for West Virginia Eligibility and Enrollment (E&E) Independent Security and Privacy Assessment project. The independent assessment was completed against the CMS MARS-E v2.0 framework.

– **Massachusetts State Ethics Commission**

*CMS Planning and Implementation Services (04/2017 to 06/2017)*

Carole Ann provided deliverable support, as well as data gathering and organization for this project. She also participated in on-site fact-finding meetings.

– **Washington State Auditor's Office (SAO)**

*Local Government IT Security Audits (11/2014 to 06/2017)*

Carole Ann served as a technical analyst assisting in the performance of information security audits for various municipalities throughout the State of Washington, sponsored by the SAO, conducting assessment activities and analysis of current environments. The team assisted in identifying threats,





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vulnerabilities, and risks, in addition to providing recommendations for remediation.

**Webber Energy Fuels (2004 to 2014)**

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



## Jonathan Williams, MA, LSSGB

DOCUMENTATION SPECIALIST

Berry, Dunn, McNeil & Parker, LLC



Jon Williams 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.

### EDUCATION AND CERTIFICATIONS

BA, English, Bowling  
Green State University

### PROPOSED PROJECT ROLE

Project Management  
Support Staff

### RELEVANT EXPERIENCE

20 years

### PROJECT EXPERIENCE

#### **BerryDunn (02/2019 to Present)**

Jon serves as an editor for BerryDunn's Consulting Team, tasked with proofreading and copyediting client deliverables, meeting notes, memos, and PowerPoint presentations for various government entities.

#### **Freelance Proofreader and Copyeditor (11/2010 to present)**

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

#### **Midwest Tape (11/2004 to present)**

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

#### **Mitchell Equipment Corporation (02/2002 to 11/2004)**

First as a visual software operator and later as a purchasing manager, Jon was responsible for contacting vendors to purchase items needed for manufacturing jobs, for stock, or for general shop or office use. He worked with Engineering and Sales to determine needs and order accordingly 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 to 06/2001)**

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



## Jordan Ramsey, MA, LSSGB

DOCUMENTATION SPECIALIST

Berry, Dunn, McNeil & Parker, LLC



**EDUCATION AND  
CERTIFICATIONS**

MA, English, Professional  
Writing, Southeast  
Missouri State University

BA, Liberal Arts and  
Sciences, English  
Literature and Creative  
Writing, University of  
Illinois at Urbana-  
Champaign

Lean Six Sigma Green  
Belt

Poynter ACES Certificate  
in Editing

**PROPOSED PROJECT  
ROLE**

Project Management  
Support Staff

**RELEVANT EXPERIENCE**

14 years

Jordan Ramsey is a Consulting Services Support Manager in BerryDunn's Government Consulting Group and Manager 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.

**PROJECT EXPERIENCE**

**BerryDunn (07/2019 to Present)**

In his role as Manager, Jordan leads 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.

**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.



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**Southeast Missouri State University (2015 to 2017)**

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

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

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

**The Southern Illinoisan (2014 to 2015)**

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

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

**– Lanier Technical College**

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

**– Hardin County, IL**

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

**– NOVA Group of Japan**

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



## KD Dobyne

PROJECT COORDINATOR

Berry, Dunn, McNeil & Parker, LLC



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

### EDUCATION AND CERTIFICATIONS

BA, Linguistics, University of Texas at Arlington

### PROPOSED PROJECT ROLE

Project Management Support Staff

### RELEVANT EXPERIENCE

3 years

### PROJECT EXPERIENCE

#### BerryDunn (09/2023 To Present)

KD serves as a project coordinator for BerryDunn's consulting teams, working with government and quasi-government clients. She assists in the compilation of deliverables, creation of visual aids, and project tracking.

#### Qualtek Wireless (08/2022 to 09/2023)

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

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

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

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

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



## Megan Hamilton, MA

DOCUMENTATION SPECIALIST

Berry, Dunn, McNeil & Parker, LLC



Megan Hamilton 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.

### EDUCATION AND CERTIFICATIONS

MA, Literary and Cultural Studies, Carnegie Mellon University

BA, English, Kent State University

Poynter ACES Certificate in Editing

### PROPOSED PROJECT ROLE

Project Management Support Staff

### RELEVANT EXPERIENCE

6 years

### PROJECT EXPERIENCE

#### BerryDunn (12/2022 to Present)

Megan works with in Consulting Support Services to provide documentation support. Megan reviews and copyedits deliverables and service level agreements for BerryDunn clients.

#### Fiverr (05/2022 to 12/2022)

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

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

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

#### Carnegie Mellon University (08/2021 to 05/2022)

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

#### Brainchild Literary Magazine (08/2020 to 05/2021)

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

#### Academic Success Center (08/2018 to 05/2021)

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



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

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



## Grace Min

DOCUMENTATION SPECIALIST

Berry, Dunn, McNeil & Parker, LLC



**EDUCATION AND  
CERTIFICATIONS**

BA, English Literature,  
*summa cum laude*, Oral  
Roberts University

**PROPOSED PROJECT  
ROLE**

Project Management  
Support Staff

**RELEVANT EXPERIENCE**

8 years



Grace Min is an experienced technical writer and editor, bringing experience in copywriting, project management, research, quality assurance, and proofreading.

**PROJECT EXPERIENCE**

**BerryDunn (11/2024 to present)**

Grace supports the consulting services group, working on the Editorial/Quality Assurance team. Grace reviews, formats and copyedits client deliverables, and service level agreements.

**Freelance Technical Writer (01/2020 to present)**

Grace performs thorough research into subjects requested by clients to write clear and accurate articles, manuals, proposals, standard operating procedures (SOP), and research reports. She collaborates with subject matter experts (SME) and refines information to create clear documentation, cross-checks sources and information to help ensure accuracy, and helps to ensure all content is optimized for SEO purposes.

**Contract Copy Editor/Proofreader (06/2017 to present)**

Grace reviews and edits a variety of manuscripts including academic articles, books, essays, and informational material. She proofreads and refine material for grammar, syntax, and style; verifies the validity of all content through meticulous fact-checking; and maintains style guide requirements.

**Oral Roberts University Graduate School of Theology and Ministry  
(08/2016 to 05/2017)**

As a graduate research assistant, Grace conducted academic research for the dean of the College of Theology and Ministry and professors. She assisted professors with grading and presentations, maintained confidential student records and updated information, and answered student and visitor inquiries.

**Oral Roberts University History, Humanities, and Government  
Department (08/2015 to 05/2016)**

Grace assisted professors in grading and attendance, updated computer log of student petitions, and designed and maintained department bulletin boards.





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**Private SAT Tutor (05/2015 to 08/2015)**

Grace developed individualized SAT study plans for the Reading, Writing and Essay sections. She conducted tutoring sessions, administered regular practice tests, and monitored student progress.

**ORU Writing Center (08/2015 to 12/2015)**

As a writing tutor, Grace provided personalized feedback to students on their essays, focusing on clarity, coherence, grammatical accuracy, and adherence to style guides. She guided students through grammar and writing tutorials, and conducted one-on-one tutoring sessions to address individual writing challenges to enhance overall writing skills.

**Oral Roberts University (08/2014 to 05/2015)**

As an academic peer advisor, Grace provided individualized tutoring to students for various subjects. She edited student papers and worked with student leadership in dormitories.

**Private Dental Practice (2012 to 2016)**

As an office assistant, Grace checked in patients, verified insurance information, and processed payments. She also answered phone calls and responded to patient inquiries, scheduled and confirmed patient appointments, and updated patient records.



## Hope Connard, PHR, SHRM-CP

MANAGER

Berry, Dunn, McNeil & Parker, LLC

### EDUCATION AND CERTIFICATIONS

BA, Human Resource Management, University of Arizona

Professional in Human Resources (PHR)

Society for Human Resource Management – Certified Professional (SHRM-CP)

SHRM Member

Global Organization Network (GIODN) Member

### PROPOSED PROJECT ROLE

Project Management Support Staff

### MEDICAID EXPERIENCE

1 year

Hope Connard is a consulting manager with 30 years of strategic Human Resource (HR leadership) experience, supporting a wide range of industries in compliance, operations, organizational transformation, and change management. Hope works closely with clients to align HR strategies with business goals, driving growth and enhancing operational efficiencies. She specializes in cultivating organizational culture and leading initiatives with a focus on coaching and development, helping leaders navigate challenges and achieve sustainable success through tailored guidance and support.

### KEY QUALIFICATIONS

- 30 years' experience strategic HR leadership
- Over 20 years of HR risk management and payroll compliance experience
- 10 years of HR consulting in a Professional Employer's Organization (PEO) environment for a variety of industries

### RELEVANT EXPERIENCE

#### BerryDunn (12/2019 to Present)

– West Virginia (WV) Bureau for Medical Services (BMS) Medicaid Information Technology Architecture (MITA) 3.0 SS-A Maintenance and Annual Update Reporting Project (07/2024 to present)

Serving as part of the project leadership team, Hope provides guidance and direction to support the team in the assessment and analysis activities, ensuring successful execution of the annual State Self Assessment (SSA) update under the Medicaid Information Technical Architecture.

#### Organization Development (OD) Services Project Workforce Development (06/2024 to Present)

Serving as a Subject Matter Expert (SME) and part of the project leadership team, Hope provides guidance and support in the development of the BMS Onboarding Training Modules and BMS branded Learning Management platform. This project supports the workforce development needs as identified in OD Phase 1 and will result in a more effective and consistent approach to onboarding newly hired employees.



#### *WV Engagement Support (05/2024 to Present)*

Hope supports the WV engagement by collaborating with the engagement leadership to help ensure project goals and deadlines are met within WV's single state Medicaid agency. She performs a variety of overflow engagement coordination duties, such as documentation/deliverable reviews and other project management activities.

#### **– Reset IV**

#### *HR Consulting and Advisory Services (04/2024 to 08/2024)*

As co-lead, Hope provided organizational change management expertise that supported the Organization Transformation Project.

#### **– State of Hawai'i (HI) Department of Human Services/Med-QUEST Division**

#### *Business Process Redesign and Associated Services (12/2023 to 07/2024)*

As co-lead, Hope provided organizational change management expertise that supported the Organization Transformation Project for HI's single state Medicaid agency, the Department of Human Services.

#### **– CareOregon**

#### *HR – Job Family Review and Consolidation (10/2023 to 01/2024)*

Hope served as the project lead in an extensive assessment of the organization's job family structure. Working with the client's HR department, Hope's support 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 to 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 championed 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 Human Resources Information System (HRIS) platform, all while maintaining a focus on initiatives aimed at enhancing organizational effectiveness.

#### **NGK Sparkplugs (04/2007 to 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 U.S. 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.



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**IT Alliance of Appalachian Ohio (04/2003 to 04/2007)**

Hope worked as an Executive Assistant and 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.



## Appendix B: Deliverable Dictionary

**Table 4: Deliverable Dictionary**

Deliverable ID	Deliverable Name	Deliverable Description
01	Commissioner Briefing	A monthly status update delivered to the BMS commissioner.
02	Monthly Status Report	A monthly status update delivered to the project sponsor(s) and project lead(s).
03	Project Schedule	A visual depiction of project duration, phases, and key milestones.
04	Procurement Schedule (as needed)	The procurement schedule will assist the BMS Procurement Office with planning and tracking procurement operations. The procurement schedule will include tasks, timelines, dependencies, resources, milestones, and contingencies to help minimize missed opportunities, help ensure compliance, and optimize resource utilization.
05	Updated Strategic Plan (as needed)	The Strategic Plan for the WV RISE Procurement will be the main source for determining project direction and objectives. It will include a determination of which modules to procure, their timelines, and the anticipated outcome of each module. In addition, the plan will inform the procurement strategy as well as the organization's strategy for achieving defined outcomes.
06	IAPD	BerryDunn will assist BMS in the development of WV RISE IAPD(s); however, the State will maintain responsibility for submission of the document. The IAPD will be developed in compliance with requirements, including 45 Code of Federal Regulations (CFR) 95.610. An implementation project management approach will also be submitted with this deliverable.
07	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
BerryDunn	Berry, Dunn, McNeil & Parker, LLC
BMS	Bureau for Medical Services
BR	Business Relationship Management
CFR	Code of Federal Register
CHIP	Children's Health Insurance Program
CL	Commodity Line
CM	Care Management
CMA	Centralized Master Agreement
CMS	Centers for Medicare and Medicaid Services
CO	Contractor Management
DoHS	Department of Human Services
EE	Eligibility and Enrollment Management
EM	Engagement Manager
FM	Financial Management
GEN	General
GPM	General Project Manager
HIPAA	Health Insurance Portability and Accountability Act
IAPD	Implementation Advance Planning Document
JRP	Joint Requirements Planning
LMPM	Lead MMIS Project Manager
LPM	Lead Project Manager
MES	Medicaid Enterprise System
MITA	Medicaid Information Technology Architecture
MMIS	Medicaid Management Information System
OD	Organizational Development
OM	Operations Management
PE	Performance Management



Acronym/Abbreviation	Definition
PL	Plan Management
PM	Provider Management
PM	Project Manager
PMP®	Project Management Professional®
PPACA	Patient Protection and Affordable Care Act
RFP	Request for Proposal
SLA	Service Level Agreement
SOW	Scope of Work
SS	Project Management Support Staff
SS-A	State Self-Assessment
State, WV	West Virginia
USVI	United States Virgin Islands
WV RISE	West Virginia Resource Integration Solutions for Enrollees



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

Alex J. Mayer  
Cabinet Secretary

Cynthia Beane, MSW, LCSW  
Commissioner

DATE: March 25, 2025

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: PF 1655837, CDO BMS25\*31  
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 West Virginia Resource Integration Solutions for Enrollees (WV Rise) Procurement Assistance Project. The service period 04/01/2025-06/14/2025. The total estimated cost is \$687,505.00.

Please feel free to contact if you have any questions or concerns. I can be reached at 304-352-3924 or [althea.m.greenhowe@wv.gov](mailto: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

Alex J. Mayer  
Cabinet Secretary

Cynthia Beane, MSW, LCSW  
Commissioner

DATE: March 25, 2025  
TO: Office of Shared Administration/Finance  
FROM: Lakendra Burdette *LB*  
Procurement Specialist  
RE: PF 1655837, CDO BMS 25\*31  
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 service period 04/01/2025-04/30/2025 in SFY 25 and service period 05/01/2025-06/14/2025 in SFY 26.

Contract extended service period: 04/01/2024 – 06/14/2025. Funding allocation table below:

CDO BMS25\*31  
WV Rise Procurement  
Assistance Project

04/01/2025-04/30/2025

05/01/2025-06/14/2025

PR05-2025	Payment	PR07 - 2026	Payment
Lead Project Manager: 50 hours @ \$215	\$10,750.00	Lead Project Manager: 75 hours @ \$215	\$16,125.00
Engagement Manager: 30 hours @ \$270	\$8,100.00	Engagement Manager: 45 hours @ \$270	\$12,150.00
Lead MMIS Project Manager 40 hours @ \$205	\$8,200.00	Lead MMIS Project Manager 60 hours @ \$205	\$12,300.00





Letter Name  
March 14, 2024  
Page 2

General Project Manager 1,143 hours @ \$180	\$205,740.00	General Project Manager 1,831 hours @ \$180	\$329,580.00
Project Management Support Staff 426 hours @ \$80	\$34,080.00	Project Management Support Staff 631 hours @ \$80	\$50,480.00
	\$266,870.00		\$420,635.00
		Grand Total:	\$687,505.00

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





## Subject: Governor's Office Approval of contracts over \$100,000



**Rosen, Bryan D** <bryan.d.rosen@wv.gov>  
to Wagner, Roberta A, Price, Robert L

Thu, Jan 23,

I spoke with Curtis early today. He relayed the following information for how we will process these through his office.

1. He would like a synopsis of the purchase. I would suggest in most cases we can pull the extended description populate that in the email to him.
2. Please note if there is a specific timeframe in the request.
3. Contracts will be reviewed at the Master Agreement level meaning that he will not be approving DOs.
4. Renewals for contracts over \$100,000 must be approved.

This process is going to be fluid and will likely morph as we move forward but this is the best information that I have today.

Bryan



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e.g. 1606N020Q02




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#### Simple Search

#### Search Editor

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

e.g. 123456789, Smith Corp

"BERRY DUNN MCNEIL & PARKER LLC"

×

Classification



Excluded Individual



Excluded Entity



Federal Organizations



Exclusion Type



- ✓ Ineligible (Proceedings Pending)
- ✓ Ineligible (Proceedings Complete)
- ✓ Prohibition/Restriction
- ✓ Voluntary Exclusion

Exclusion Program







Location

Dates

Reset

Entity Information

Entities

Disaster Response Registry

Responsibility / Qualification

Exclusions

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## West Virginia Secretary of State — Online Data Services

### Business and Licensing

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			
<b>Business Purpose</b>	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		
<b>Charter County</b>	Kanawha	<b>Control Number</b>	0
<b>Charter State</b>	ME	<b>Excess Acres</b>	
<b>At Will Term</b>	A	<b>Member Managed</b>	MBR
<b>At Will Term Years</b>		<b>Par Value</b>	
<b>Authorized Shares</b>		<b>Young Entrepreneur</b>	Not Specified



**Addresses**

Type	Address
<b>Designated Office Address</b>	209 WEST WASHINGTON STREET CHARLESTON, WV, 25302
<b>Mailing Address</b>	2211 CONGRESS STREET PORTLAND, ME, 04102
<b>Notice of Process Address</b>	URA SERVICES, INC. 5098 WASHINGTON STREET W. SUITE 407 CHARLESTON, WV, 25313
<b>Principal Office Address</b>	2211 CONGRESS STREET PORTLAND, ME, 04102
Type	Address

**Officers**

Type	Name/Address
<b>Member</b>	CHARLES K. LEADBETTER III 2211 CONGRESS STREET PORTLAND, ME, 04102
<b>Member</b>	SETH E. WEBBER 2211 CONGRESS STREET PORTLAND, ME, 04102
<b>Member</b>	KATHY PARKER, C.P.A. 2211 CONGRESS STREET PORTLAND, ME, 04102
<b>Member</b>	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

2015

2014

2013

2012

2011

2010

2009

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

Tuesday, March 25, 2025 — 2:06 PM

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