State of West Virginia
Delivery Order

Order Date: 06-03-2025

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 BMS2500000042 1	**Change Order No:**
Procurement Folder:	1712916	
Document Name:	CWI Project Management Services Phase VI	
Document Description:	CWI Project Management Services Phase VI	**Reason for Modification:**
Procurement Type:	Central Delivery Order	
Buyer Name:	Crystal G Hustead	
Telephone:	(304) 558-2402	
Email:	crystal.g.hustead@wv.gov	
Shipping Method:	Best Way	
Free on Board:	FOB Dest, Freight Prepaid	**Master Agreement Number:** CMA 0511 HHR2100000003 1

VENDOR

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

PORTLAND ME 04102
US

Vendor Contact Phone: 6813138905 **Extension:**

Discount Details:

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

DEPARTMENT CONTACT

Requestor Name: Kelly (Jimmy) Dowden
Requestor Phone: (304) 356-4861
Requestor Email: jimmy.k.dowden@wv.gov

2025
FILE LOCATION _____

INVOICE TO

PROCUREMENT OFFICER: 304-352-4286
HEALTH AND HUMAN RESOURCES

BUREAU FOR MEDICAL SERVICES

350 CAPITOL ST, RM 251

CHARLESTON WV 25301-3709

US

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

Purchasing Division's File Copy

Total Order Amount:	$3,937,280.00

CH 6/11/25

PURCHASING DIVISION AUTHORIZATION
DATE: 6/12/25
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION
DATE: 6/16/25
ELECTRONIC SIGNATURE ON FILE

Extended Description:

Child Welfare Initiatives Project Management Services Phase VI

Service Period: 06/15/25-06/14/26

Total: $3,937,280.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		$0.0000	$361,630.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2025-06-15	2026-06-14				2025-05-24

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

Extended Description:
Lead Project Manager: Optional Renewal Year Two

Hourly Rate: $215.00

1,682 hours @ $215=$361,630.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		$0.0000	$47,250.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2025-06-15	2026-06-14				2025-05-24

Commodity Line Description: Engagement Manager: Optional Renewal Year Two

Extended Description:
Engagement Manager: Optional Year Two

Hourly Rate: $270.00

175 hours @ $270=$47,250.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		$0.0000	$3,017,960.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2025-06-15	2026-06-14				2025-05-24

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

Extended Description:
General Project Manager: Optional Renewal Year Two

Hourly Rate: $190.00

15,884 hours @ $190=$3,017,960.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		$0.0000	$510,440.00
Service From	**Service To**	**Manufacturer**		**Model No**	**Delivery Date**
2025-06-15	2026-06-14				2025-05-24

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

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

Hourly Rate: $80.00

6,380.5 hours @ $80=$510,440.00

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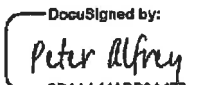Berry, Dunn, McNeil & Parker, LLC

May 15, 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 Department of Human Services (DoHS), Bureau for Social Services (BSS) providing support for the Child Welfare Initiatives (CWI) Project Management Services VI under our master contract (CMA HHR21*03). As stated in the SOW document, the duration of this work is estimated to be 13 months. BerryDunn agrees to a SOW start date effective June 15, 2025.

Assuming a start date of June 15, 2025, the work would then conclude on June 14, 2026.

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:

Peter Alfrey

2DAAA44ADB3A477...
Peter Alfrey
Principal
Berry, Dunn, McNeil & Parker, LLC
207-541-2242

Ok
Althea Greenhow

b BerryDunn

West Virginia Department of Human Services, Bureau for Social Services

Child Welfare Initiatives Project Management Services Phase VI

Staffing Plan and Scope of Work

Prepared for Centralized Master Agreement HHR 21*03

WEST VIRGINIA DEPARTMENT OF
HUMAN SERVICES

Submitted by:

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

Charlie Leadbetter, PMP®, Principal
Berry, Dunn, McNeil & Parker, LLC
cleadbetter@berrydunn.com

Lisa Roberts, PMP®, Manager
Berry, Dunn, McNeil & Parker, LLC
lisa.roberts@berrydunn.com

Submitted On:
May 15, 2025

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Staffing Plan and Scope of Work for the West Virginia Department of Human Services, Bureau for Social Services, Child Welfare Initiatives Project Management Services Phase VI

This scope of work (SOW) describes the tasks Berry, Dunn, McNeil & Parker, LLC (BerryDunn) will perform project management services to assist the West Virginia (State, WV) Department of Human Services (DoHS), Bureau for Social Services (BSS), Child Welfare Initiatives (CWI) Project Management (PM) Services Phase VI. The work completed under CWI PM Services Phase VI 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 Berry, Dunn, McNeil & Parker, LLC and WV Bureau for Medical Services (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 considered the following key information in preparing this SOW.

1.1 Key Information

Since 2019, BerryDunn has assisted DoHS on several critical Child Welfare initiatives. The objective of this project is to design, develop, and implement (DDI) a data warehouse solution to support continuous quality improvement (CQI) of residential and home and community-based services for children with mental and behavioral health needs. Projects include building a data warehouse that will integrate data from various data sources and systems, including, but not limited to the WV DoHS integrated eligibility system and the comprehensive child welfare information system (CCWIS) module, Medicaid Management Information System (MMIS), Enterprise Data Solution (EDS), managed care organizations (MCO), administrative service organization, (ASO), agency service provider, and other relevant stakeholder data as needed. Data store/warehouse/reporting marts development, data analysis and reporting, and program changes needed to support quality outcomes are included in the project scope. The output of the activities completed during this project provide BMS and sister-agencies with quantitative data and analysis, including report prototypes, which then become inputs into the data warehouse and dashboard reporting system that will be utilized across DoHS programs to sustain the CQI effort. The goal is to improve outcomes for children's mental and behavioral health services.

The State continues to implement various priorities in the Agreement between the State and the U.S. Department of Justice (DOJ), including restructure of the model of care for residential treatment facilities, implementation, and access to home and community-based services, and sustainability of the CQI process, data, and reporting requirements. Over the next 13 months, the State will require ongoing project management services centered on the high-priority projects that BerryDunn is currently supporting and other critical child welfare reform efforts.

Project management services are focused on coordinating activities across initiatives, keeping tasks and projects on schedule, and providing decision support. The BerryDunn project management team will strengthen the execution of priority initiatives by helping ensure that programmatic and policy

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changes are managed in a controlled manner and support the State project teams and the people making funding, prioritization, and resourcing decisions.

In addition, BerryDunn continues to assist implementing the Quality Assurance and Performance Improvement (QA/PI) system, including a comprehensive data store that integrates and unifies child and service information, continuous analytics support, and a continuous quality improvement (CQI) plan, all of which are foundational components of the Agreement. The QA/PI work requires two distinct levels of effort: 1) The ongoing development, finalization, and implementation of the CQI plan that was presented to the Legislature in December 2021 and updated annually thereafter, and 2) The continued design, management, and build-out of a data store with integrated and unified child eligibility, placement, service utilization, and system engagement information and continuous reporting/analysis in alignment with pre-defined measures from the Agreement and CQI program-level measures that are goal posts for success and progress toward a sustainable CQI system.

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

- *Project prioritization*: creating and executing the initiative and project decision-making matrix.

- *Project management*: assisting with project/task initiation, planning, execution, control, and completion.

- *Project governance*: developing project and program structures; helping ensure accountability.

- *Project status report*: communicating the status of the projects.

- *Project coordination*: sharing knowledge across teams; avoiding redundant activities.

- *Project support*: scheduling meetings; documenting notes, action items, decisions, and risks; providing quality assurance.

- *Policy updates*: updating State policies to reflect procedural and programmatic changes from initiatives.

- *Business process improvement*: analyzing, reengineering, and improving business processes to support project implementation.

- *Change management*: utilizing organizational change processes to help DoHS prepare for changes related to the initiatives and manage and reinforce the changes.

- *Data management and analytics:* continuously developing and expanding data store modules to incorporate additional data sources to support the ongoing blueprint for the Agreement and CQI data and reports, including requirements discovery, data architecture design, prototyping, coding development, technical specifications, testing, data extracts, and submitting associated code sets to the State; provide continuous ad hoc and recurring reporting and analysis support.

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- *CQI:* Annually revising and further implementing the approved framework for the CQI plan. Providing support to the Office of Quality Assurance for Children's Programs to help ensure sustainability.

The CWI PM Services Phase VI will also aid the State in meeting its identified Medical Information Technology Architecture (MITA)-specific goals, such as:

- Improve the State's effectiveness and efficiency

- Minimize risk and maximize value from contracted services and products

- Leverage technology to enhance performance and decision-making

- Ensure program quality

- Improve healthcare outcomes for members

- Establish access to data from sister-agencies and programs within DoHS

- Improve access to clinical and encounter data

- Improve operational efficiency and reduce costs in the healthcare system

- Enhance DoHS's ability to monitor contractor performance against approved measures

- Improve effectiveness and efficiency of Provider Enrollment function

1.2 Assumptions

Estimates for this SOW are based on the following assumptions:

- The State leadership team will consist of Christina Mullins, Deputy Secretary, as the project lead, Cynthia Beane, BMS Commissioner, Lorie Bragg, BSS Interim Commissioner, and Nicholas Stuchell, Bureau for Behavioral Health (BBH), Interim Commissioner as the project sponsors.

- The State project lead will provide timely decision-making and responses to information requests from the BerryDunn project team.

- The BerryDunn leadership team will consist of Charlie Leadbetter and Lisa Roberts. Charlie will provide Engagement Management oversight, and Lisa will provide oversight as the Lead Project Manager. Jennifer Elwood and Yang Ji, with the Health Analytics Practice Group, will have oversight of the data and analytics project work.

- This work will begin upon approval of this SOW and a mutually agreed-upon date and is projected to continue for 13 months.

- All project documents—including meeting outcomes, action items, issues, risks, and decisions—will be on the State-designated site and will be brought to the attention of the CWI PM Services Phase VI project sponsor.

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- Deliverables will be provided in an agreed-upon format.

- BerryDunn and the State will explore strengthening WV partnerships with states and other territories and leverage any needed tools and procedures when applicable.

- Should changes related to Information Technology (IT) systems, including changes to State or other data sources for previously implemented systems, be identified during this SOW, the State and BerryDunn will coordinate prioritization of efforts necessary to support these changes with the appropriate State and/or vendor parties.

- BerryDunn will provide project management, subject matter expertise, and support activities for the DDI of multiple business initiatives and activities that DoHS might undertake during this SOW's period. BerryDunn may perform services including, but not limited to, program research, financial analysis and modeling, waiver support, regulatory analysis, federal and stakeholder negotiation, policy and procedure assistance, data store development, data analysis, and reporting and program development.

1.3 Project Funding

The State intends to utilize the Medicaid Management Information System (MMIS) Implementation Advance Planning Document (IAPD) for this SOW. The Centers for Medicare & Medicaid Services (CMS) has 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 $3,937,280 (included in the approved advance planning document [APD]). Therefore, any additional scope that is added to the services provided under this SOW may require the State to update its MMIS IAPD to allocate additional funds for project management.

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2.0 Project Scope and Staffing Plan

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

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

Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
1.0	**Engagement Oversight** *Service Approach* BerryDunn's leadership team will provide oversight and coordination of BerryDunn staff, services, and deliverables. BerryDunn's project leadership will meet with the BerryDunn project lead and other key team members on a regular basis to discuss project status and issues impacting timely completion of the project work, and oversee BerryDunn staff, services, and review of deliverables. *Deliverable(s)* • D01: Monthly Commissioner Briefing *Completion Criteria* All parties will deem Engagement Oversight complete upon project completion and acceptance of the final monthly status report (MSR) by the project sponsor or their designee.	Charlie Leadbetter Lisa Roberts Peter Alfrey Nicole Becnel Ed Daranyi Jennifer Elwood Yang Ji Emily McCoy Dawn Webb Hope Connard	380.0
2.0	**Project Management Services** *Service Approach* The BerryDunn team will be responsible for execution, control, and monitoring of project activities in accordance with the Project Management Plan (PMP). BerryDunn will provide the following services: BerryDunn's team will be responsible for the execution, control, and monitoring of project activities in accordance with the approved PMP (the original PMP was approved during the initial phase of the project and revised annually). Project execution activities may include program analysis and design. • Facilitating meetings, preparing meeting	Charlie Leadbetter Lisa Roberts Shelly Brubaker Melissa Hicks Yang Ji Annie Messinger Andrea Richardson Michelle Weaver Shandia Benke Hailey Holden Sam Kessler Kourtney Kirk	4,000.0

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Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	materials, and taking notes for BerryDunn- and State-owned meetings • Preparing monthly project status updates, risks, issues, and briefings for the State leadership team • Managing project logs (action item, decision, issue, and risk tracking) • Storing project documentation repository in an agreed-upon SharePoint location • Facilitating a Project Closeout Meeting prior to the end of the project • Reporting the project closeout activities in the final MSR Deliverable(s) • D02: Monthly Status Report • D03: Project Schedule • D04: Action item, risk, issue, and decision logs *Completion Criteria* All parties will deem Project Management Services complete upon project completion and acceptance of the final MSR by the project sponsor or their designee.	Skye Kwong Cate Poling Courtney Rombow	
3.0	**Change Management Support** *Service Approach* The BerryDunn team will work with agency staff to incorporate change management principles to prepare, equip, and support individuals to adopt change. In alignment with a proven methodology, BerryDunn's approach to change management will be to utilize change management processes that will continue through the life of the project. Deliverable(s) • D05: Meeting agendas and notes *Completion Criteria* All parties will deem Change Management Support complete upon project completion and acceptance of the final MSR by the project sponsor or their designee.	Charlie Leadbetter Lisa Roberts Shelly Brubaker Melissa Hicks Yang Ji Annie Messinger Andrea Richardson Michelle Weaver Caitlin Cabral KD Dobyne Carol Ann Guay Megan Hamilton Skye Kwong Grace Min	3,500.5

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Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
		Alycia Minshall Jordan Ramsey Courtney Rombow Jon Williams	
4.0	**CQI Support** Service Approach BerryDunn will continue to provide CQI support to implement the approved CQI plan. In collaboration with the Office of Quality Assurance for Children's Programs and small cross-bureau program-level teams, BerryDunn will perform the following: • Help to ensure data collection is in place for capturing child-level data • Work with program teams to establish a method for data collection, including a short-term, stop-gap solution and a long-term, systematic solution • Assist in setting up data extracts (i.e., queries) and match across data sets where possible • Assist in outlining report content, time periods, and associated visualizations • Assist in developing ongoing reports • Schedule and facilitate program-level data reviews • Develop, document, and implement (as requested) quality sampling review processes (as relevant) • Support annual updates to the published CQI plan. Deliverable(s) • D06: Key Performance Indicators (KPIs) and associated data collection per the CQI plan, including vendor data Completion Criteria All parties will deem CQI Support complete upon project completion and acceptance of the final MSR by the project sponsor or their designee.	Charlie Leadbetter Lisa Roberts Shelly Brubaker Lloyd Butler Chris Fanikos Melissa Hicks Yang Ji Danielle Joslyn Annie Messinger Arisara Miller Dina Nash Andrea Richardson Michelle Weaver Fei Zou Grady Black Skye Kwong John Reilly Courtney Rombow Brett Torra Joseph Tumblin	8,000.0
5.0	**QA/PI System and Analytics Support** *Service Approach*	Charlie Leadbetter	6,600.0

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Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	BerryDunn will continue to provide analytical support and design and development of the QA/PI data store and dashboard system supporting the CQI process. The scope of these services includes: • Collaborate with the project team to identify analytical support and reporting needs and identify actionable metrics of interest • Translate desired reporting and analyses into feasible logical specifications • Develop and prepare dashboards, reports, and analysis for defined measures per the Agreement and CQI program • Reflect user requirements in the design of reporting, dashboards, and underlying databases • Design data store architecture and develop databases and relevant transformations to validate, clean, and integrate data from multiple sources to support the QA/PI dashboards and CQI reporting; this will occur in collaboration with the DoHS Office of Management Information Services (OMIS) • Provide user documentation and training for dashboards, and developer/maintenance documentation for the underlying databases • Advise OMIS on dashboard and underlying data store access models for reporting, analysis, and file sharing purposes • Support up to 20 ad hoc data analysis requests outside of routine CQI reporting. *Deliverables* • DO7: QA/PI logical specifications for performance measures per DOJ Agreement • DO8: Specifications, implementation, and deployment package for QA/PI data store to support dashboards and CQI reporting, associated data transformation code, and associated documentation for OMIS • DO9: Dashboards to support programs in	Lisa Roberts Shelly Brubaker Lloyd Butler Chris Fanikos Melissa Hicks Yang Ji Danielle Joslyn Annie Messinger Arisara Miller Dina Nash Andrea Richardson Michelle Weaver Fei Zou Grady Black Skye Kwong John Reilly Courtney Rombow Brett Torra Joseph Tumblin	

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Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	the DOJ Agreement • D10: Results and documentation of ad hoc data analysis requests • D11: Documentation and training for dashboard users and analysts Completion Criteria All parties will deem QA/PI System and Analytics Support complete upon project completion and acceptance of the final MSR by the project sponsor or their designee.		
6.0	**Sub-Project Management Services** Service Approach • Project management, including ongoing planning, monitoring, executing, and reporting of approved sub-projects and ad hoc tasks in accordance with project management best practices • Ad hoc support Deliverable • D12: Sub-Project Management Materials Completion Criteria All parties will deem Sub-Project Management Services complete upon project completion and acceptance of the final MSR by the project sponsor or their designee.	Charlie Leadbetter Lisa Roberts Shelly Brubaker Melissa Hicks Annie Messinger Ashley Pannell Andrea Richardson Michelle Weaver Skye Kwong Courtney Rombow	1,500.0
7.0	**APD Support** *Service Approach* BerryDunn will develop and assist in facilitating the approval of APDs to help ensure that the project continues to maintain buy-in and financial backing from the relevant federal partners. Deliverable • D13: Implementation Advance Planning Document (IAPD) *Completion Criteria* All parties will deem APD Support complete upon project completion and acceptance of the final MSR by the project sponsor or their designee.	Charlie Leadbetter Lisa Roberts Peter Alfrey Emily McCoy Dawn Webb Hailey Holden	141.0
Total Hours			24,121.5

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Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
Total Not-To-Exceed Cost Estimate			**$3,937,280.00**

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3.0 Project Resources and Hours

The table below displays additional staffing plan details, total hours, and costs by resource based on the hourly rates and staffing classifications provided in the Commodity Lines (CLs) for Optional Year 2 in CMA HHR 21*03.

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

- Commodity Line 15: Engagement Manager (EM) ($270/hour)
- Commodity Line 14: Lead Project Manager (LPM) ($215/hour)
- Commodity Line 17: General Project Manager (GPM) ($190/hour)
- Commodity Line 18: Project Management Support Staff (SS) ($80/hour)

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

CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
15	EM	$270	Charlie Leadbetter	175.0	$47,250
14	LPM	$215	Lisa Roberts	1,682.0	$361,630
17	GPM	$190	Peter Alfrey	24.0	$4,560
17	GPM	$190	Nicole Becnel	24.0	$4,560
17	GPM	$190	Shelly Brubaker	1,560.0	$296,400
17	GPM	$190	Lloyd Butler	1,500.0	$285,000
17	GPM	$190	Ed Daranyi	24.0	$4,560
17	GPM	$190	Jennifer Elwood	24.0	$4,560
17	GPM	$190	Chris Fanikos	1,100.0	$209,000
17	GPM	$190	Melissa Hicks	1,560.0	$296,400
17	GPM	$190	Yang Ji	1,452.0	$275,880
17	GPM	$190	Danielle Joslyn	1,100.0	$209,000
17	GPM	$190	Emily McCoy	24.0	$4,560
17	GPM	$190	Annie Messinger	1,680.0	$319,200
17	GPM	$190	Arisara Miller	960.0	$182,400
17	GPM	$190	Dina Nash	600.0	$114,000
17	GPM	$190	Ashley Pannell	180.0	$34,200
17	GPM	$190	Andrea Richardson	1,400.0	$266,000
17	GPM	$190	Michelle Weaver	1,400.0	$266,000
17	GPM	$190	Dawn Webb	24.0	$4,560
17	GPM	$190	Fei Zou	1,248.0	$237,120
18	SS	$80	Shandia Benke	24.0	$1,920

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CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
18	SS	$80	Grady Black	600.0	$48,000
18	SS	$80	Caitlin Cabral	120.0	$9,600
18	SS	$80	Hope Connard	24.0	$1,920
18	SS	$80	KD Dobyne	120.0	$9,600
18	SS	$80	Carol Ann Guay	120.0	$9,600
18	SS	$80	Megan Hamilton	120.0	$9,600
18	SS	$80	Hailey Holden	24.0	$1,920
18	SS	$80	Sam Kessler	24.0	$1,920
18	SS	$80	Kourtney Kirk	24.0	$1,920
18	SS	$80	Skye Kwong	564.0	$45,120
18	SS	$80	Grace Min	120.0	$9,600
18	SS	$80	Alycia Minshall	120.0	$9,600
18	SS	$80	Cate Poling	24.0	$1,920
18	SS	$80	Jordan Ramsey	120.0	$9,600
18	SS	$80	John Reilly	900.0	$72,000
18	SS	$80	Courtney Rombow	1,680.0	$134,400
18	SS	$80	Brett Torra	916.0	$73,280
18	SS	$80	Joseph Tumblin	616.5	$49,320
18	SS	$80	Jon Williams	120.0	$9,600
Total				24,121.5	$3,937,280

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4.0   Project Hours and Costs Per Month

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

Table 3: Estimated Project Costs by Month

Month	EM Hours	LPM Hours	GPM Hours	SS Hours	Est. Hours Per Month	Est. Cost Per Month
Month 1	6.0	71.0	705.0	258.5	1,040.5	$171,515
Month 2	15.0	140.0	1,312.0	533.0	2,000.0	$326,070
Month 3	15.0	140.0	1,329.0	533.0	2,017.0	$329,300
Month 4	15.0	140.0	1,317.0	533.0	2,005.0	$327,020
Month 5	15.0	140.0	1,317.0	533.0	2,005.0	$327,020
Month 6	15.0	140.0	1,312.0	533.0	2,000.0	$326,070
Month 7	15.0	140.0	1,317.0	533.0	2,005.0	$327,020
Month 8	15.0	140.0	1,317.0	533.0	2,005.0	$327,020
Month 9	15.0	140.0	1,312.0	533.0	2,000.0	$326,070
Month 10	15.0	140.0	1,317.0	533.0	2,005.0	$327,020
Month 11	15.0	140.0	1,317.0	533.0	2,005.0	$327,020
Month 12	13.0	140.0	1,316.0	534.0	2,003.0	$326,370
Month 13	6.0	71.0	696.0	258.0	1,031.0	$169,765
Total	175.0	1,682.0	15,884.0	6,380.5	24,121.5	$3,937,280

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5.0 High-Level Timeline

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

Figure 1: Proposed High-Level Timeline

Task	Month												
	1	2	3	4	5	6	7	8	9	10	11	12	13
1.0 Engagement Oversight													
2.0 Project Management Services													
3.0 Change Management Support													
4.0 CQI Support													
5.0 QA/PI System and Analytics Support													
6.0 Sub-Project Management Services													
7.0 APD Support													

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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 DoHS will be for actual hours expended, which may or may not equal the projected level of effort but will not exceed the projected level of effort.

DocuSigned by:

Peter Alfrey

_____
Signature

5/15/2025

_____
Date

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

Chint Mull

_____
Signature

6-3-25

_____
Date

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Appendix A: Resumes

Charles K. Leadbetter, PMP®, Prosci® CCP

PRINCIPAL

Berry, Dunn, McNeil & Parker, LLC

Charlie Leadbetter is a principal and leads BerryDunn's State Government Practice Group. He has provided executive leadership for state agencies across the country for over 30 years. He offers this project best practices in project oversight, project health assessments, QA, Independent Verification and Validation (IV&V), project management, and engagement oversight. He has experience managing large state, high stakes projects, and utilizes project management best practices during all his engagements.

EDUCATION AND CERTIFICATIONS

BS, Computer Science and Economics, University of Maine

Prosci® Certified Change Practitioner

Certified Project Management Professional® (PMP®)

PROPOSED PROJECT ROLE

Engagement Manager

MEDICAID EXPERIENCE

13 years

KEY QUALIFICATIONS

- Leader of State Government Practice Group
- 30+ years of state agency consulting experience
- Expertise in project health assessments, QA, IV&V, and project management
- Experience with planning and implementation of large, complex systems
- Prosci® Certified Change Practitioner (CCP)
- Certified Project Management Professional® since 2006

PROJECT EXPERIENCE

BerryDunn (1993 to present)

– Kentucky Education and Labor Cabinet (ELC)

IV&V Services for the Kentucky Unemployment Insurance Portal (KUIP) Modernization Project (09/2024 to present)

Charlie serves as the principal for the BerryDunn team providing continuous IV&V services for the KUIP Modernization, Kentucky's migration to Deloitte's uFACTS™ solution for an unemployment insurance (UI) program. IV&V activities include providing recommendations to the State on the quality of work, assessing the

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effectiveness of project management, and identifying risks and issues along with recommended next steps via monthly reports.

– Missouri Department of Labor and Industrial Relations (DOLIR)

Tips and Complaints Portal (09/2024 to present)

Charlie serves as the project principal for the BerryDunn team providing business process reengineering services for DOLIR's Tips and Complaints Portal project. BerryDunn is assisting the agency to fundamentally rethink how they can improve citizen service, cut operational costs, and become world-class in administering Tips and Complaints. The purpose of this engagement is to analyze the current work structures and processes DOLIR is encumbered with and propose an approach, within the confines of statutory and regulatory requirements, which redesigns the way work is done in support of Missouri citizens, the organization's mission, and fiscal stewardship.

– North Carolina Department of Public Instruction (DPI)

System Strategy Services (09/2024 to present)

Charlie serves as the project principal for the BerryDunn team providing system strategy services to help DPI develop a better understanding of their current financial reporting business processes and related systems as well as opportunities for process improvement. System strategy services include conducting interested parties on current business processes, developing current and desired future state workflow diagrams, conducting peer-state outreach and interviews, and leading joint requirements planning sessions with recommended next steps.

– South Dakota Bureau of Finance and Management (BFM)

IV&V Services for the Project BISON (05/2024 to present)

Charlie serves as the project principal for the BerryDunn team providing continuous IV&V services for Project BISON, South Dakota's migration to Oracle's cloud-based Fusion Enterprise Resource Planning (ERP) solution. IV&V activities include providing recommendations to the State on the quality of work, assessing the effectiveness of project management, and identifying risks and issues along with recommended next steps.

– Nevada Governor's Finance Office (GFO), Office of Project Management

Project Management Services for ERP Implementation (02/2024 to present)

Charlie serves as the project principal on the BerryDunn team performing project management services for Nevada GFO's Core NV ERP project. GFO is implementing a CGI Advantage solution for its financial and HR ERP system replacement. BerryDunn is providing project management, vendor and contract management, business process change, communication, and training support and project governance to the implementation team.

– Washington State Liquor and Cannabis Board (WSLCB)

Strategic Portfolio Management Governance Model and Prioritization Process Development (02/2024 to present)

Charlie serves as the project principal for the BerryDunn team assisting the senior leadership of the WSLCB under the Director's Office to develop a strategic portfolio management process that enables an initiative intake process, development of objective assessment criteria, and formalization or a prioritization model that be used as decision-making framework to assess and determine agency priorities and communicate decisions broadly.

– Hawai'i Department of Budget and Finance

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Budget Management System Procurement (01/2024 to present)

Charlie serves as the project principal for the BerryDunn team performing advisory services and assisting in the development of a Request for Proposal (RFP) for a Budget Management System for the State's budget processes. This project involves requirements refinement, procurement assistance, review of proposals and contract development post award.

– Maine Department of Environmental Protection (DEP)

Enterprise Licensing Planning Organizational Change Management (OCM) Services (01/2024 to present)

Charlie serves as the project principal for the BerryDunn team assisting the DEP OCM services as the DEP replaces its Enterprise Licensing System. BerryDunn is now providing OCM services to facilitate and mitigate the necessary disruptions associated with integrating the new electronic licensing system (ELS) with existing business processes.

Enterprise Licensing Planning and Procurement Project (06/2020 to 10/2021)

Charlie served as project principal for the BerryDunn team assisting the DEP in planning for the replacement of its Enterprise Licensing System. This project involved the development of functional and technical requirements, performing research into licensing systems in peer states, and conducting an analysis of the overall cost of acquisition. At the conclusion of the project, BerryDunn presented a business case for the acquisition and implementation of a next generation licensing system to executive bodies.

– Arizona Health Care Cost Containment System (AHCCCS)

IT Governance, Risk, and Compliance (GRC) Implementation (08/2023 to present)

Charlie serves as project principal on the BerryDunn team providing implementation of the IT governance and risk management roadmap recently developed by BerryDunn for AHCCCS's IT GRC team. BerryDunn collaborates with the GRC team in collecting data, information mapping, and implementing the IT governance and risk management roadmap to the desired maturity levels within the COBIT 2019 framework while satisfying Information Technology Infrastructure Library (ITIL) aspects throughout.

IT Governance and Risk Development Project (10/2021 to 04/2022)

Charlie served as project principal for the BerryDunn team performing an IT governance maturity assessment for AHCCCS. The assessment involved the selection of an IT governance framework for AHCCCS' IT services department, determining the Department's current and desired maturity levels based on environmental factors, updating the agencies internal controls, evaluating AHCCCS' information and technology risk exposure, and creating a strategic roadmap to address gaps identified during the assessment.

– Washington State Department of Transportation State Ferries (WSF)

OCM Practitioner Services (08/2023 to present)

Charlie serves as project principal on the BerryDunn team providing OCM services to WSF. WSF is currently executing multiple information technology projects and planning for future projects which will result in significant changes to the Department's working environment and daily business processes. BerryDunn is helping ensure Department personnel experience these changes as positive while escalating and resolving concerns as WSF transitions from their current state to their future state. These services include business process reviews, policy and procedure reviews, and other OCM-oriented deliverables.

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– Maine Department of Administrative and Financial Services (DAFS), Offices of Child and Family Services (OCFS)

Child Care Management System (CCMS) IV&V (06/2023 to present)

Charlie serves as project principal on the BerryDunn team providing IV&V periodic reviews for Maine's implementation of a new CCMS. The BerryDunn team is observing project activities, reviewing vendor deliverables, documenting findings, and providing recommendations for correcting any weaknesses identified during the quarterly reviews.

Comprehensive Child Welfare Information System (CCWIS) IV&V Services (07/2020 to 05/2022)

Charlie served as project principal for the BerryDunn IV&V team. The team monitored and assessed the CCWIS implementation project on a quarterly basis during its 18-month implementation, as well as a period of six months after implementation.

– Missouri Office of Administration

Digital Government Transformation (DGT) Program Management Services (02/2023 to present)

Charlie serves as principal on the BerryDunn team performing project management planning, oversight, and related services for the State's DGT initiative. The portfolio includes four project areas consisting of citizen journey mapping, Microsoft 365 implementation, enterprise application infrastructure, and citizen portal and data lake development. The DGT portfolio of projects will be implemented for all executive, judicial, and legislative agencies of the State of Missouri.

– Government of New Brunswick (GNB) Department of Finance and Treasury Board

ERP Project Monitoring Services (10/2020 to present)

Charlie serves as project principal for the BerryDunn team providing independent project monitoring services throughout the life of the GNB ERP implementation project. The ERP implementation project is a business-led transformational project that will result in redesigned business processes and the implementation of a cloud-based solution for human resources, payroll, finance, and procurement services. Through provision of project monitoring services, BerryDunn is supporting risk management using project oversight and QA services, enabling the GNB to assess implementation efforts, providing regular project status reports objectively and comprehensively to GNB senior management, and supporting recurring assessments by measuring period-to-period trends in delivery and improvements on gaps.

– Kentucky Department of Revenue (DOR)

IV&V Services for Integrated Tax System (05/2019 to present)

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

– West Virginia Bureau for Social Services (BSS)

Child Welfare Initiatives Project (10/2018 to present)

Charlie serves as project principal for the BerryDunn team providing project management services that strengthen execution of priority Bureau for Children and Families initiatives and help to ensure programmatic and policy changes are being managed to support the State project teams making funding, prioritization, resourcing, and technical decisions.

– Vermont Agency of Digital Services (ADS)

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Independent Reviews (01/2018 to present)

Charlie has been project principal for multiple independent reviews of large IT-related initiatives for Vermont agencies. These reviews, required under State statute by the Office of the Chief Information Officer (CIO), involve independently evaluating the vendor contracts, project planning and management activities, soundness of the proposed solutions, and State readiness to implement the systems. The most recent include:

- Department of Liquor and Lottery (DLL)– Independent Review for the 2nd Chance Lottery Solution (07/2024 to present)

- Department of Health – Independent Review for the Medical Practice Board Licensing System (07/2024 to present)

- Vermont Cannabis Control Board (VCCB) – Independent Review for the Application Phase 2 System Project (05/2024 to present)

- Agency of Commerce and Community Development – Independent Review for the Grants Management System Project (12/2023 to 04/2024)

- Department of Taxes – Independent Review for the Scanning, Imaging, Data Capture and Remittance Processing System Project (12/2023 to 01/2024)

- ADS – Independent Review for the Automatic Call Distribution Modernization Project (10/2023 to 12/2023)

- Agency of Transportation (AOT) – Independent Review for the Roadway Safety Screening and Safety Management System Project (10/2023 to 12/2023)

- DLL – Independent Review of Business to Business e-Commerce Website Project (09/2023 to 11/2023)

- AOT – Independent Review of VTrans State Highway Access and Work Permit System (06/2023 to 09/2023)

- Agency of Education (AOE) – Independent Review of Neuroscience of Literacy Professional Learning Module (03/2023 to 05/2023)

- Department of Environmental Conservation, Agency of Natural Resources – Independent Review of Revolving Fund System Replacement Project (02/2023 to 05/2023)

- Department of Labor (DOL) – Independent Review of Unemployment Insurance Modernization Project (02/2023 to 05/2023)

- AOE – Independent Review of Alternate Assessments for Students in the Areas of Math, Science, and English Language Arts Project (09/2022 to 11/2022)

- VCCB – Independent Review of Cannabis Control Board System Project (05/2022 to 08/2022)

- AOE – Independent Review of Innovative Statewide Summative Assessments in English Language Arts (ELA), Math, and Science Project (04/2022 to 08/2022)

- DOL – Independent Review of Workers' Compensation System Modernization Project (11/2021 to 01/2022)

- Department of Motor Vehicles (DMV) – Independent Review of Legacy Core Systems Replacement Project (10/2021 to 12/2021)

- Department of Public Safety – Independent Review of CAD/RMS System Modernization (09/2020 to 02/2021)

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- DLL – Independent Review of Licensing and Enforcement Project (10/2020 to 12/2020)
- AOE – Independent Review of Child Nutrition Management System Project (04/2020 to 06/2020)
- Agency of Human Services – Independent Review of Electronic Medical Records and Electronic Health Records System Development and Implementation Plan (01/2020 to 05/2020)
- Child Care Services Division – Independent Review of Child Care Information System (02/2020 to 03/2020)
- Department of Vermont Health Access (DVHA) – Independent Review of Premium Processing Platform Project (01/2019 to 03/2020)
- DVHA – Independent Review of Vermont Clinical Registry Enhancements Design, Development, and Implementation Project (11/2018 to 04/2019)
- DMV – Independent Review for the Agency of Transportation, Department of Motor Vehicles Commercial Vehicle Operations System Replacement (11/2018 to 01/2019)

- **Arizona State Land Department (ASLD)**

Oversight and QA for a Migration to Salesforce.com (09/2023 to 06/2024)

Charlie served as project principal for the BerryDunn team providing oversight of ongoing development and QA of the product to help ensure developed functionality in Salesforce.com performs the same tasks and produces similar results as the current ERP system. These tasks included reviewing project documents, artifacts, and tools; participating in and observing relevant project meetings; identifying risks and issues; providing real-time guidance and advice and presenting memos to summarize findings and overall status at each key phase of the project.

- **Minnesota Department of Natural Resources (DNR)**

Feasibility Study Services for a Risk Assessment and Technology Review (01/2024 to 06/2024)

Charlie served as the project principal for the BerryDunn team performing a risk assessment and technology review of DNR's legacy system as they update to a new ELS. Assisted by the Minnesota Department of Information Technology Services, DNR's Fish and Wildlife and Enforcement Divisions were seeking to replace their ELS and need feasibility and risk assessment services for the project to progress. The objective of this assessment was to address cost, scope risks and issues, project quality, stakeholder engagement and satisfaction, project management and organizational change as well as help ensure a modern and nimble technology going forward.

- **New Mexico Finance Authority (NMFA)**

Document and Data Management Consulting Services (10/2023 to 06/2024)

Charlie served as the project principal on the BerryDunn team providing document and data management consulting services. The overall goals of this work were for the NMFA and its staff to be able to access documents and data efficiently and effectively, whether working in the office, remote, or on their mobile device; be assured that such documents or data are correct and in the most recent version; and appropriately store, maintain, and discard documents and data as prescribed in a retention schedule. The BerryDunn team is assisted NMFA as they performed a document inventory, categorized documents, developed a naming convention, assessed existing software and systems, define storage solutions and retention schedules, and provided training and implementation of new systems and procedures.

- **New Hampshire Department of Education, Bureau of Vocational Rehabilitation (VRNH)**

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Strategic Planning Services (04/2023 to 02/2024)

Charlie served as project principal for the BerryDunn team performing project initiation and planning, an environmental scan and strengths, weaknesses, opportunities, and threats (SWOT) analysis, strategic planning sessions, and strategic plan development. BerryDunn provided biweekly status reports to VRNH as they led the Bureau through a strategic planning process. This process defined the Bureau's work and enhanced the dual missions of the Bureau: assisting individuals with disabilities in obtaining and maintaining competitive, integrated employment and assist business partners with services to meet their workforce needs.

– Minnesota Department of Employment and Economic Development (DEED)

Audit, Risk Assessment, and Technical Review of Unemployment Insurance Strategic Portfolio (10/2020 to 01/2024)

Charlie served as project principal for the BerryDunn team conducting two point-in-time independent risk assessments, project audits, technical reviews, and security reviews of DEED's UI Strategic Program. This work is an effort to improve the current UI system's flexibility, enable the program to respond quickly to policy change, and enhance user experience for applicants and employers.

Administration and Financial Services Division (AFS) Mapping Project (02/2023 to 12/2023)

Charlie served as project principal on the BerryDunn team performing an examination of defined division processes and the following production of visual flow diagrams, illustrations, and process maps of the current "As-Is" and future "to-be" of the State.

– Vermont Secretary of State (SOS)

IT Strategic Planning (08/2023 to 01/2024)

Charlie served as project principal on the BerryDunn team aiding in the creation of an IT Strategy Implementation Plan. The SOS required an increased level of support to successfully procure, design/configure, develop, test, implement, and operationalize new systems while supporting all other IT needs simultaneously. As time progressed, the SOS' office continued to deepen its reliance on IT services as part of its core service offerings. While the reliance on IT systems has grown, the support staff for those systems has not grown at equal pace. Due to the convergence of IT project needs over the next several years, BerryDunn was contracted to assist in documenting the current and planned IT projects and the desired organizational/staffing support structure, as well as conduct a gap analysis and provide an implementation plan.

– Washington Department of Social and Health Services (DSHS)

Organizational Development Subject Matter Expertise (11/2022 to 11/2023)

Charlie served as principal on the BerryDunn team providing organizational assessment, OCM, and IT governance framework services, as DSHS restructures their information technology units to form a new Administration, called the Technology Innovation Administration (TIA), which leverages a workforce of over 700 staff.

– Arizona Department of Agriculture (AZDA)

Assessment of Current Licensing System and Development of a Transition Scope of Work (12/2022 to 07/2023)

Charlie served as project principal on the BerryDunn team performing an assessment of AZDA's licensing and permit systems. The study determined an implementation roadmap, deliverables, and a task order SOW for AZDA's IT Modernization Strategic Initiative.

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– West Virginia Bureau for Public Health (BPH)

Electronic Vital Records System Implementation (02/2020 to 07/2023)

Charlie served as project principal for the BerryDunn team providing project management implementation services for a new electronic vital records system. BerryDunn facilitated stakeholder involvement and OCM as the State migrated all historical data from the paper-based system to a simple web-based platform for internal and external users.

Enhancing Laboratory Capacity-Enhancing Detection (ELC-ED) Project Management (01/2021 to 12/2021)

Charlie served as project principal for the BerryDunn team providing project management to the BPH as it maximized COVID-19-related grants. BerryDunn provided grants management support for ELC-ED Project and the Bureau's Data Modernization Initiative, including a baseline assessment, strategic implementation plan, and a workforce assessment and development plan.

Strategic Map Implementation Support and Performance Management/Quality Improvement (PM/QI) Planning Project (10/2019 to 09/2021)

Charlie served as project principal for the BerryDunn team providing project management and guidance in development of a PM/QI Plan. BerryDunn provided project oversight services, reporting the project status to the sponsor and project leads monthly, weekly, and as needed. With the development of a PM/QI Plan, BerryDunn built capacity to use data to measure performance, solidified a commitment to continuous improvement, and provided guidance to staff on leveraging QI tools and techniques.

Children with Special Health Care Needs Business Process Redesign and Procedure Manual Completion (CSHCN) (03/2020 to 01/2021)

Charlie served as project principal for the BerryDunn team providing process mapping, requirements gathering, and procedure manual development for the Children and Youth with Special Health Care Needs Program (CYSHCN). BerryDunn worked with the program to refine and finalize the Procedure Manual to align with the eight CYSHCN National Standards. The program was able to implement streamlined processes and a detailed requirements repository, which allows the program to finalize a Request for Quotation (RFQ) or RFP to procure a new care coordination and case management solution. Collectively, the business processes and case management system support the program in improved efficiency and quality of care coordination and integration of information services.

Emergency Medical Services (EMS) Data System Procurement Support (11/2019 to 10/2020)

Charlie served as project principal for the BerryDunn team providing fact-finding and requirements gathering for a new EMS data system. BerryDunn conducted joint requirements planning sessions to refine the requirements and draft an RFQ. BerryDunn worked with WV Purchasing to finalize and release the RFQ, coordinate responses to vendor questions, and assist with scoring vendor proposals. As a result of a robust procurement process, Office of Emergency Medical Services has contracted with a new EMS data system vendor to implement a system that more fully meets their needs, including robust reporting and analytics, and improved ease-of-use for staff and stakeholders.

HIV and Hepatitis Workflow/Business Process Analysis and System Configuration (09/2019 to 06/2020)

Charlie served as project principal for the BerryDunn team providing process mapping and a workflow efficiency assessment. BerryDunn redesigned current processes for case management,

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defined process improvements that aligned with organizational goals, and developed training and implementation support materials.

Public Health Accreditation Preparation Project (10/2018 to 09/2019)

Charlie served as project principal for the BerryDunn team providing gap analysis assessing BPH documentation and conformity to Public Health Accreditation Board (PHAB) guidelines. A Gap Analysis and Recommendations Report identified areas where BPH documentation was a gap, partially complete, or complete, for each of the 108 measures required for PHAB accreditation. BerryDunn provided recommendations to address gaps, review documentation that might expire, update documentation, and adhere to PHAB documentation guidance. These recommendations served to inform BPH's strategic planning and immediate next steps to move toward accreditation readiness.

– **Oregon Enterprise Information Services (EIS)**

Core Services Development Performance Management (03/2022 to 06/2023)

Charlie served as project principal for the BerryDunn team aligning the EIS Office of Data Governance and Transparency's (ODGT's) strategy and goals with tactical and operational actions for each of EIS's divisions. The team worked with EIS to develop a performance management plan and other strategic documentation to assist EIS in executing and measuring performance of their divisions against their goals. The team also assisted EIS with understanding and documenting service- and operational dependencies and relationships between their divisions to help improve coordination and effectiveness/efficiency of operations.

Billing System Replacement (08/2020 to 01/2021)

Charlie served as project principal for the BerryDunn team assisting Data Center Services (DCS) in the initiation and planning phases of their Billing System Replacement Project. As part of this project, BerryDunn assessed current DCS workflows for the monthly billing process; developed a future state workflow; documented gaps between the current billing system and desired future state; and developed mandatory and desired requirements for the replacement of the existing systems.

– **Minnesota Department of Labor and Industry (DLI)**

Workers' Compensation (WC) Modernization Program Assessment and Audit (12/2022 to 05/2023)

Charlie served as principal on the BerryDunn team performing a system audit and solution technical review of the WC system known as Work Comp. Campus. The system audit evaluated Work Comp. Campus system adoption and usability, then recommend solutions for any identified issues.

WC Modernization Program Assessment/Audit (10/2019 to 04/2020)

Charlie served as principal for an independent risk assessment and program audit of the WC Modernization Program. The assessment/audit included a program management review, security review, architecture review, and technology solution assessment for the purposes of helping to ensure the solution met development best practices and standards, helping to ensure that architecture discipline was maintained, identify risks and issues during development that could be corrected prior to production deployment, and obtain an independent review of the overall quality of the system.

– **Hawai'i Department of Accounting and General Services (DAGS)**

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IV&V Services for the Enterprise Financial Solution (EFS) Project (06/2022 to 03/2023)

Charlie served as project principal on the BerryDunn team provided continuous IV&V services for the EFS Project. The BerryDunn team helped ensure completeness, soundness, quality, reason, and effectiveness of the EFS Project plans and their execution, schedule, management structure, requirements management approach, deliverables, success metrics and identification of risk and issue areas and provided next steps for addressing identified risks/issues.

– Oregon State Accident Insurance Fund Corporation (SAIF)

Quality Management Services (QMS) for Workers' Compensation Claims System Implementation Program (CSI Program) (04/2021 to 02/2023)

Charlie served as project principal for the BerryDunn team providing quality management development, initial risk assessment, and point-in-time IV&V checks. Through provision of QMS, BerryDunn defined the scope, responsibilities, standards, review procedures, and reporting for the CSI Program's QMS efforts, supporting risk and issue identification/management and measuring period-to-period trends in delivery, improvements on gaps, and providing regular project status reports to SAIF executive leadership and the project team.

– Vermont Agency of Education (AOE)

Shared School District Data Management System (SSDDMS) Project Path Forward Facilitation (05/2022 to 11/2022)

Charlie served as project principal on the BerryDunn team conducting an independent, objective, and multi-faceted assessment of the SSDDMS Project, the implemented PS eFinancePlus (eFP) solution, and Power School to help determine if the original and current project path is still viable.

SSDDMS Services (05/2019 to 10/2020)

Charlie served as the project principal for the BerryDunn team providing development and implementation of the latest version of the VT AOE's Accounting Handbook. The Handbook is the single guidance document for all supervisory unions and school districts and was designed to help ensure consistent accounting practices. Furthermore, the VT AOE implemented a school reporting finance and HR system for all supervisory unions and school districts across the State.

– Indiana Department of Workforce Development (DWD)

Finance Department Assessment (12/2021 to 09/2022)

Charlie served as project principal for the BerryDunn team assessing current Finance Department staff workload and resource utilization efficiency. BerryDunn identified and captured gaps, analyzed DWD Finance Department processes, and the current structure of the Department to assess and provide recommendations for alternative organizational models. BerryDunn determined where current training needs were not being satisfied and identified options to improve DWD Finance Department cross-training, including continuous professional development and succession planning.

– Indiana Office of Technology (OIT)

Billing Process and System Evaluation (10/2021 to 01/2022)

Charlie served as project principal for the BerryDunn team evaluating OIT's internal IT chargeback billing system and process. The evaluation included detailed documentation of IOT's current billing system processes, data feeds, and pain points. BerryDunn worked with IOT staff, customers, vendor representatives, and peer-state employees to assess viable options for improving the billing system/process. Based on these findings, BerryDunn provided IOT with recommendations

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on whether IOT's legacy system can be optimized to meet future state needs, or if a new system should be acquired and implemented.

- **Oregon Lottery Commission**

Enterprise Change Management (ECM) (01/2020 to 01/2022)

Charlie served as project principal for the BerryDunn team assessing, developing, and implementing strategies that support the OR Lottery Commission in executing its ECM effort, involving execution of the Commission's strategic plan and numerous related projects. This effort included determining readiness activities and development of change competencies to assist with the creation of a contemporary and empowered workplace that strives for the continuous improvement of Lottery employees and services.

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

Business Process Redesign for Behavioral Health Administration (BHA) (12/2020 to 10/2021)

Charlie served as project principal for the BerryDunn team providing business process redesign project implementation services. Key activities included performing a current environment assessment, facilitating business process redesign activities, performing OCM, developing IT system requirements and an RFP for a solution integrator for a case management and electronic health record (EHR) solution, and providing procurement support.

- **Maine (ME) Department of Administrative and Financial Services (DAFS)**

Enterprise Services Assessment (03/2021 to 10/2021)

Charlie served as project principal for the BerryDunn team reviewing ME State Postal Service operations and finances to assess their current and future financial viability. Charlie oversaw the review of revenue and expense reports, interviews with internal stakeholders and peer states, staffing and payroll analysis, project management, and presented the final report.

- **New Hampshire Department of Revenue Administration (DRA)**

Revenue Information System (RIMS) Business Requirements, RFP Development, System Selection Assistance, and Project Health Assessments (10/2015 to 07/2021)

Charlie served as the project principal for the DRA's migration from a tax information management system until the selection of a new RIMS. Charlie managed BerryDunn's role in guiding the DRA through the RFP and proposal scoring process. Charlie oversaw the BerryDunn team during project health assessments for the three-year implementation of RIMS.

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

Disease Surveillance System Assessment (11/2020 to 03/2021)

Charlie served as principal on the BerryDunn team that developed in-depth assessments and provided recommendations for MDHHS' disease surveillance system modernization efforts.

- **Arizona Department of Economic Security (ADES)**

AzTECS, AzCCATS, and LIHEAP Modernization Planning Project (AALMPP) Feasibility Study (04/2020 to 02/2021)

Charlie served as project principal for the BerryDunn team assisting ADES in planning for the replacement of three legacy mainframe systems. This project involved performing a requirements analysis, alternatives analysis, and a cost benefit analysis to develop an IAPD and a DDI Statement of Work to procure replacement systems.

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

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IT Funding Model Evaluation (01/2020 to 12/2020)

Charlie served as project principal on the BerryDunn team reviewing and assessing the current funding model for the MMB's enterprise IT systems. The engagement included an evaluation of the current and future enterprise system needs, recommendations for developing technologies that addressed these needs, and development of financial strategies to adequately fund the State's enterprise IT systems on a long-term basis.

– Vermont Judiciary

Next Generation Case Management System (NG-CMS) Planning and Implementation Services (12/2015 to 12/2020)

Charlie was the project principal for the BerryDunn team in supporting the Judiciary with project management services for the planning and implementation of its NG-CMS. This included the development of a project charter, system planning and procurement oversight, and project management of the CMS implementation.

– Wyoming State Legislature

State IT Funding Request Study (08/2020 to 12/2020)

Charlie served as project principal for a BerryDunn team conducting a study of the State's 19 IT funding requests for purposes of assessing the IT funding request process. This process included the planning phase, review and decision-making phase, and identification of areas for improvement and correlating recommendations to further enhance and develop the process. BerryDunn was directed to use five of the 19 IT funding requests as case studies—for the purpose of determining the sufficiency of due diligence exercised in planning and decision-making related to each request.

– West Virginia Bureau for Medical Services (BMS)

COVID-19 Contact Tracing and Testing Initiative (04/2020 to 08/2020)

Charlie served as principal for the BerryDunn multi-disciplinary team providing broad level support including grant work plan and budget development, sub-recipient funding award management and reporting, and overall strategy development across the many funding streams received because of the COVID-19 pandemic.

– New Mexico Corrections Department (NMCD)

Commercial Off-the-Shelf (COTS) Offender Management System (OMS) Replacement (10/2015 to 06/2020)

Charlie was project principal, leading the BerryDunn team in providing the NMCD with high-level requirements definition, RFP development, procurement support, contract negotiation, gap analysis, as well as project management and QA throughout the OMS selection life cycle.

– Wisconsin Physicians Service Insurance Corporation (WPS)

Independent Assessment of the TRICARE for Life (TFL) Technology Modernization Project Implementation (04/2020 to 06/2020)

Charlie served as project principal for the BerryDunn team conducting an independent and objective assessment of the compliance of the new TFL system with contractual and regulatory standards applicable to WPS.

– Indiana State Department of Health Maternal and Child Health (MCH)

Data System Assessment (08/2019 to 02/2020)

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Charlie was project principal and assessed the current MCH data systems and end user applications, identified gaps, made recommendations, and developed requirements to enable the MCH Division to procure services and solutions needed to meet future data systems' needs. These needs included, but were not limited to, health information exchange (HIE) systems interoperability, robust Extract, Transform, and Load (ETL) processes, provider access and information sharing, and data management as it related to Title V block grant MCH national performance measures and State of Indiana-specific initiatives.

– Washington State Department of Health (DOH)

Home Visiting Services Account Long-Term Data System Solution Analysis Project (10/2019 to 03/2020)

Charlie served as project principal for the BerryDunn team performing an assessment of the future needs for a long-tern data solution for DOH's home visiting services. Key activities included leading fact-finding sessions and facilitating process mapping with internal and external stakeholders (e.g., community providers and local health organizations), performing a gap analysis between the current state and the desired future state, and developing recommendations to help DOH achieve its vision and goals for a data solution.

– Washington Health Benefit Exchange (WAHBE)

Learning Management System (LMS) Assessment Project (10/2019 to 01/2020)

Charlie served as project principal on the BerryDunn team performing an assessment to understand challenges in the current environment and needs for the future related to an LMS. The BerryDunn team developed requirements and use cases, performed an alternatives assessment, and made recommendations.

Operations and Maintenance (O&M) System Integrator Re-Procurement Planning (05/2018 to 05/2019)

Charlie provided leadership and oversight to this engagement to assess, define requirements, and develop an RFP for the re-procurement of an O&M system integrator for the WAHBE.

– New Hampshire Liquor Commission (NHLC)

Project Management for Next Generation Retail Business Systems (03/2011 to 01/2012; 044/2016 to 12/2019)

The NHLC embarked on an initiative to document its major business processes, develop IT system requirements, and write an RFP for acquisition of a new merchandising, warehousing, and point-of-sale (POS) IT system. BerryDunn led the documenting of business processes and systems requirements for the Administration and Enforcement and Licensing Divisions of the NHLC. As follow-on work, BerryDunn provided QA services related to system implementation. Charlie was responsible for BerryDunn's project management and oversight responsibilities during implementation.

– Georgia Department of Administrative Services

Comprehensive Business Process Review and Redesign Project (06/2019 to 11/2019)

Charlie served as the project principal as BerryDunn conducted an end-to-end process review, from submission through collection of administrative fees. BerryDunn identified major pain points in the process and provided recommendations for alleviating those pain points while avoiding errors. The team provided information and recommendations on successful practices and related systems used by other states for the same process.

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– Arizona Department of Economic Security (ADES)/Division of Developmental Disabilities (DDD)

Focus Health Insurance Portability and Accountability Act (HIPAA)/TCS Compliance Project (04/2019 to 10/2019)

Charlie served as project principal for the BerryDunn team performing an assessment and gap analysis of DDD's compliance and alignment with HIPAA- and CMS- transactions and claim processing code sets and to develop alternatives and an IT roadmap to close gaps and achieve the desired future state.

– Minnesota IT Services (MNIT)

SWIFT Limited Upgrade Project Audit (07/2019 to 09/2019)

Charlie served as the principal of the BerryDunn team to provide an independent audit of the upgrade of the Oracle Financial Management System (FMS) application. The audit helped to ensure compliance with security, architecture, and accessibility policies and standards. BerryDunn assessed the audit elements from the MNIT-Project Audit Framework and Checklist and delivered the final report in September of 2019.

– Oregon Enterprise Technology Services (OR ETS)

Integrated IT Service Management (ITSM) (03/2018 to 03/2019)

Charlie oversaw BerryDunn's project with the OR ETS department to provide business analysis services in support of the ITSM system project. Such services included providing documentation, analysis, process improvement workshop facilitation, and requirements gathering. The purpose of the ITSM system project was to provide efficiency and effective enhancements that would lead to OR ETS providing greater value to its customers.

Additional information for the following projects is available, upon request:

– Vermont Agency of Digital Services

Independent Reviews (07/2012 to 01/2019)

- Department of Motor Vehicles, Agency of Transportation, Department of Motor Vehicles Commercial Vehicle Operations System Replacement (11/2018 to 01/2019)
- Department of Public Safety, Proposed Vermont State Police Dispatch System (04/2018 to 08/2018)
- Agency of Education, Shared School District Data Management System (01/2018 to 02/2018)
- Department of Taxes, Scanning, Imaging, Data Capture, and Remittance Processing Solution (01/2018 to 02/2018)
- Secretary of State, Voter Accessibility Project (11/2017 to 12/2017)
- Department of Public Safety, State Police Mobile Video Solution (09/2017 to 12/2017)
- Agency of Education, Grants Management System (06/2017 to 09/2017)
- Department of Education, Statewide Financial Management Information System (03/2017 to 04/2017)
- E911 Bureau, e911 System (06/2014 to 09/2014)
- Department of Motor Vehicles, Driver License Automated Testing System (07/2013 to 08/2013)

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- Department of Corrections, Offender Management Solution (07/2012 to 09/2012; 04/2013 to 08/2013)
- Department of Public Safety, Grants Management Solution (10/2012 to 12/2012)
- **Idaho State Liquor Division (ISLD)**

Assessment of Business and Operational Practices (03/2018 to 07/2018)

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

Operational, Financial, and Account Review of Automated Support and Enforcement Processes and Systems (12/2017 to 06/2018)

Childcare Tracking System Needs Assessment and RFP Development (06/2014 to 08/2015)

- **Washington State Department of Corrections (WA DOC)**

Information Technology Governance Model and Process (ITGMP) (12/2017 to 06/2018)

- **Vermont Department of Health Laboratory**

Project Management for STARLIMS Laboratory Information Management System (02/2017 to 06/2018)

- **South Carolina Department of Health and Environmental Control (DHEC)**

EHR System Planning and Procurement Assistance (09/2016 to 05/2018)

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

Organizational and Business Process Redesign (07/2017 to 04/2018)

- **Vermont Department of Labor**

IV&V Report of Labor Enterprise Computing System Information (11/2017 to 03/2018)

- **Maine Judicial Branch**

Case Management System Planning and Implementation Services (06/2014 to 12/2017)

- **Massachusetts State Ethics Commission**

Case Management System Planning and Implementation Services (04/2017 to 06/2017)

- **Vermont Department of Liquor Control**

RFP Development, System Selection, Contract Negotiation, and Project Management for Retail and POS Solution (09/2011 to 09/2012; 07/2013 to 01/2016; 05/2016 to 04/2017)

- **Nebraska Department of Motor Vehicles**

Consulting Services to Assist in the Modernization of a Vehicle and Title Registration System (11/2015 to 04/2017)

- **Vermont Agency of Education**

District Finance System Specifications (12/2015 to 12/2016)

- **Minnesota Department of Public Safety, Bureau of Criminal Apprehension**

System Risk Assessment (11/2015 to 12/2016)

- **North Carolina Administrative Office of the Courts**

e-Courts Strategic Plan (02/2016 to 11/2016)

- **Vermont Agency of Human Services**

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Uniform Reporting Requirements and Specialized Programs Project (02/2015 to 10/2016)

Health Services Enterprise Lessons Learned Initiative (03/2014 to 04/2014)

Medicaid Enterprise Solution Risk Assessment, Cost Benefit Analysis, and IAPD Development (02/2011 to 04/2011)

– **West Virginia Bureau for Children and Families**

Project Management for Enterprise Content Management Project (08/2015 to 08/2016)

– **Georgia Department of Driver Services**

Card Production Services Procurement Consulting (12/2015 to 06/2016)

– **Massachusetts Executive Office of Education**

Early Education (QRIS) Current and Future Business Process Analysis and Documentation (01/2015 to 12/2015)

– **Kentucky Transportation Cabinet and Commonwealth Office of Technology**

IV&V for Kentucky Automated Vehicle Information System (KAVIS:2) (08/2015 to 11/2015)

– **Vermont Agency of Transportation**

Business Process Documentation/Requirements Definition for LMS (05/2015 to 07/2015)

– **Vermont Green Mountain Care Board**

Vermont Health Care Uniform Reporting and Evaluation System (VHCURES) Independent Review, Procurement Assistance, and Project Management (01/2014 to 05/2015)

– **Massachusetts Executive Office of Health and Human Services**

Next Generation Systems Planning Project and MITA State Self-Assessment (SS-A) (05/2011 to 02/2015)

State Medicaid Health IT Planning and IAPD Development (10/2020 to 04/2011)

– **Massachusetts District Attorneys Association**

Court Case Management System Planning (04/2014 to 12/2014)

– **Massachusetts Department of Transportation**

Time and Attendance Process Review Project (12/2013 to 06/2014)

– **Alabama Alcohol Beverage Control Board**

Wholesale/Retail System Analysis and Design (04/2013 to 06/2014)

– **Maryland Health Benefit Exchange**

IV&V for Maryland's Health Benefit Exchange Implementation (11/2012 to 04/2014)

– **New Hampshire Governor's Commission on Medicaid Expansion**

Consulting Services for Medicaid Eligibility Expansion Study (07/2013 to 10/2013)

– **Massachusetts Office of the State Auditor**

IT Roadmap and Staffing Plan (04/2012 to 06/2012; 06/2013 to 10/2013)

– **West Virginia Offices of the Insurance Commissioner**

Health Insurance Exchange Planning (06/2011 to 06/2013)

– **Missouri Department of Mental Health**

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EMR System Assessment and Long-Range Information Strategy Plan (03/2013 to 04/2013)

– Vermont Department of Taxes

Project Management and Business Analysis for Integrated Tax System (12/2012 to 03/2013)

– Maine Human Resources Division

System Analysis and Requirements Development for Procurement of HR Management System (03/2012 to 08/2012)

– Maine Office of the State Controller

Independent Assessment of Processes for Billing of IT Services to State Agencies (10/2011 to 01/2012)

– Maryland Judiciary

Development of Comprehensive Strategy and Requirements and IV&V for an Integrated Financial Systems Solution (02/2008 to 09/2011)

– Massachusetts Human Resources Division

IV&V for PeopleSoft System Upgrade (09/2009 to 06/2010)

– New Hampshire Department of Administrative Services

QA for ERP System Implementation (01/2007 to 06/2010)

– Massachusetts Information Technology Division

Independent Project Health Assessments of Capital IT Projects (02/2009 to 04/2009)

– New Hampshire Department of Resources and Economic Development

Statewide Strategic Telecommunications Planning (11/2007 to 08/2008)

– Connecticut Department of Public Health

Business Analysis of Licensing and Credentialing System (10/2007 to 04/2008)

– West Virginia Bureau for Medical Services

QA Oversight of MMIS and Pharmacy POS Implementation (04/2003 to 03/2008)

– North Carolina Office of the State Auditor

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

– New Hampshire Department of Health and Human Services

IV&V for Medicaid Decision Support System Implementation (01/2003 to 06/2005)

Project Management for Enterprise Data Warehouse Project (09/2001 to 03/2002)

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Lisa Roberts, PMP®

MANAGER
Berry, Dunn, McNeil & Parker, LLC

PROPOSED PROJECT ROLE

Lead Project Manager

MEDICAID EXPERIENCE

33 years

Lisa Roberts is a highly capable, hands-on leader with demonstrated ability to generate enthusiasm and participation of internal staff and external customers in program improvement efforts. She has deep expertise with public social service programs including Temporary Assistance for Needy Families (TANF), Supplemental Nutrition Assistance Program (SNAP), Children's Health Insurance Program (CHIP), Medicaid, child welfare, child support, and developmental disabilities programs.

PROJECT EXPERIENCE

BerryDunn (02/2021 to present)

Lisa focuses on providing consulting services for health and human service (HHS) agencies across the country focusing on assisting state agencies with overall program management, procurement support, strategic plan implementation, and process redesign projects. Lisa is currently dedicated to the following project:

– West Virginia Department of Human Services (DoHS)

Child Welfare Initiatives Project Management Services (02/2021 to present)

Lisa is a human services lead for BerryDunn and manages the team focused on statewide child welfare reform to improve outcomes and reduce unnecessary out of home placements for children across the State. The child welfare effort requires cross agency collaboration with BSS, BMS, and BBH. This multiyear project includes program and process improvement, policy development and implementation, stakeholder engagement and significant focus on CQI including data and reporting.

Embassy Management, LLC (2009 to 02/2021)
– Executive Vice President of Operations and Workforce Services

Lisa was responsible for oversight of four Operating Companies providing services in New Mexico, California, Washington, and Oregon.

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In this role, she provided excellent management of multiple government funding sources and contracts including:

- Medicaid Waiver Services in California, Washington, and Oregon.
  - o Implementation and ongoing management of Medicaid waiver residential services for individuals approved for the Intellectual Developmental Disabilities (IDD) waiver
- Federal TANF funding for a statewide program throughout New Mexico .
- County-funded services throughout Washington
- Vocational Rehabilitation services in Nevada, New Mexico, Oregon, and Washington
- Residential services for individuals with a developmental disability in Los Angeles and Sacramento

As part of this work, Lisa successfully reached outcomes and helped ensure quality services were provided for vulnerable adults. She provided all areas of fiscal management for 11 programs with different funding sources, managing $35 million in annual revenue. She also evaluated all programs for effectiveness, performance outcomes, and coordination of services.

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

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

Arbor Education and Training, LLC (Division of ResCare) (2003 to 2009)
As Idaho State Director for Enhanced Work Services Program, Lisa provided oversight including fiscal management, contract performance outcomes, and evaluation and improvement for TANF-funded services through the Idaho State Division of Welfare. Services were provided in two separate regions for the State. In this role, she exhibited excellence in fiscal management, outcomes, and quality performance; conducted quality improvement evaluation and program monitoring and outcomes measurement systems; and provided oversight of two regional programs with four offices, 50 staff, and $3 million in annual revenue.

Idaho Division of Welfare (1991 to 2003)
During her tenure with the Idaho Division of Welfare, Department of Health and Welfare, Lisa held various positions. All the positions had responsibilities that included program implementation, eligibility and policy development and training, budget development as well as monthly review and ongoing monitor of budgets, and legislative policy and budget presentations. As the self-reliance trainer, Lisa was responsible for Medicaid program and policy implementation in an eight-county area. As a self-reliance supervisor and interim regional program manager, she was accountable for overall management of Medicaid, TANF, SNAP, Child Care, Aid to the Aged, Blind and Disabled (AABD) and home and community-based services including Medicaid funded waiver programs. The following highlight positions held during her tenure:

- Interim Regional Program Manager

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- Self-Reliance Supervisor
- Self-Reliance Trainer
- Eligibility Examiner

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

PRINCIPAL
Berry, Dunn, McNeil & Parker, LLC

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 (GPM) for the WV DoHS BMS, Peter brings detailed knowledge about health plan operations, process improvement, procurements and vendor management, along with best practices that support Medicaid and HHS 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.

EDUCATION AND CERTIFICATIONS

MBA, Organizational Management, Husson University

MA, History, Providence College

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

Certified Project Management Professional® (PMP®)

Lean Six Sigma Green Belt (LSSGB)

Prosci® Certified Change Practitioner

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

11 years

KEY QUALIFICATIONS

- Certified Project Management Professional® with over 17 years of project management experience
- Over 17 years of healthcare operations experience; 10 years of Medicaid experience
- Over 9 years of government HHS consulting experience
- Experience leading Medicaid system implementations, data management initiatives, and program Medicaid enterprise systems implementations in states such as Washington, Maryland, Vermont, New Jersey, and WV

PROJECT 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

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manager, and/or program managers.

– West Virginia DoHS, BMS, and West Virginia Children's Health Insurance Program (WVCHIP)
BerryDunn Project Management Office (10/2014 to present)

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:

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

- *Partnership Management Support Project (06/2024 to present)*

- *People's Access to Help (PATH) DDI Project Management (08/2018 to 11/2019; 06/2023 to present)*

- *Substance Use Disorder Waiver Initiative Project (07/2017 to 03/2019; 06/2023 to present)*

- *Medicaid Enterprise System Modernization Strategy and Procurement Phases I, II, and III (10/2020 to present)*

- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (09/2020 to present)*

- *Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project Phases I, II, III and IV (09/2019 to present)*

- *Mountain Health Trust Managed Care Organization (MCO) Procurement Assistance Project 06/2019 to 06/2021; 12/2023 to 06/2024)*

- *Incident and Case Management System Procurement Assistance (02/2023 to 06/2024)*

- *Public Health Emergency (PHE) Support Project (12/2021 to 06/2024)*

- *Data Improvement Project Phases I, II, III and IV (09/2019 to 06/2024)*

- *Coordinated Care Management Project Management and Procurement Assistance / Mountain Health Promise (MHP) Implementation Project Management Support and Operational Readiness Review (02/2019 to 06/2020) and MHP Re-Procurement (10/2021 to 09/2022)*

- *Mental Health Parity Compliance Analysis (05/2020 to 09/2022)*

- *Contact Tracing (04/2020 to 09/2022)*

- *WVCHIP Out-of-Pocket Maximum Project (05/2021 to 06/2022)*

- *MCO Encounter Data Quality Phases I and II (06/2020 to 02/2022)*

- *WVCHIP MCO Transition Planning Project Phases I and II (03/2019 to 06/2021)*

- *WVCHIP Operational Readiness Review (09/2020 to 01/2021)*

- *Asset Verification System Project Management Services and Procurement Assistance (04/2017 to 02/2018)*

- *Project Management of Medicaid Management Information System 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 HCA, Washington's single state Medicaid agency, with 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.

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

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

Peter supported DMAHS, New Jersey's single state Medicaid agency, with 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 WV MMIS procurement in 2015.

– Vermont Green Mountain Care Board (GMCB)

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

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; O&M; 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.

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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 Bairey 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 WV, New England States Consortium System Organization (NESCSO) Medicaid Enterprise Systems Conference (MESC), Louisville, Kentucky, 08/2024

- Session abstract, *Transforming Systems, Culture and Operations to Support Your Medicaid Enterprise* selected by NESCSO MESC in Denver, Colorado, featuring representatives from Hawaii, New Jersey, Oregon, and WV (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

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- 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 WV, 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.

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Nicole Becnel, PMP®, ECCP

PRINCIPAL
Berry, Dunn, McNeil & Parker, LLC

EDUCATION AND CERTIFICATIONS

BA, Speech and Hearing Science, University of South Florida

Certified Project Management Professional® (PMP®)

Executive Coaching Certification®

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

23.5 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 as 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 HHS 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 HHS industry. Nicole's talents are exemplified through the partnership with WV Medicaid leadership she championed to initiate a multi-state collaborative where states can share information and brainstorm solutions; Nicole leads the WV project team with this initiative, and since its inception, WV has increased membership to 14 state partners that participate monthly.

KEY QUALIFICATIONS

- 22 years' HHS portfolio, program, and project management experience for single state Medicaid and other HHS agencies
- Large-scale IT and Medicaid Enterprise technical implementation and certification experience
- Currently leading the WV PM team to support the State with the implementation of a fully integrated eligibility and enrollment solution–one of the first in the nation
- Proven project management track record of over 100 short and long-term projects delivered on time and within budget
- Led the project team that supported the State to secure over $750M federal dollars for WV's transformation initiatives for their state programs.
- Private Sector Technology Group (PSTG) Past Vice-Chair

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- Led the WV PM team, who became one of the first in the nation to help the State successfully implement a MMIS solution in accordance with the project's schedule and budgets, without issuing advanced payments to providers

PROJECT 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 Department of Human Services (DoHS) Engagement Manager (2012 to present)
- *Payment Error Rate Measurement (PERM) Project Phase II (05/2020 to 05/2021)*
- *Substance Use Disorder (SUD) Waiver Initiative Project Phases III and IV (03/2019 to 05/2021)*
- *State Plan Review and Support (SPRS) Project (02/2020 to 05/2021)*
- *Technical Assistance and Program Support Project (TAPS) (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)*
- *MCO Transition Planning Project Phase II (03/2020 to 02/2021)*
- *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)*
- *Mountain Health Trust (MHT) MCO Procurement Assistance Project Phase II (05/2020 to 09/2020)*
- *MHP Implementation Project Management Support (Coordinated Care Management) (03/2020 to 06/2020)*
- *1915(c) Children with Serious Emotional Disorders (CSED) Waiver Development Project 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)*
- *Data Visioning and Warehouse Request for Proposal (RFP) Development and Procurement Assistance (09/2017 to 08/2019)*
- *WVCHIP MCO Transition Planning (01/2019 to 07/2019)*
- *Provider Enrollment Application (PEA) Year 2 (05/2018 to 05/2019)*
- *Innovation Accelerator Program (IAP) Data Analytic Technical Support (09/2017 to 08/2018)*
- *MITA State Self-Assessment (SS-A) Maintenance and Annual Update Assistance Project (08/2015 to 08/2018)*
- *Technical Information and Enterprise Project Management Services (TEPMS) (05/2017 to 07/2018)*
- *Gap Analysis and Project Management Services (GAPMS) (10/2016 to 06/2018)*

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- *Provider Re-enrollment Application Project (03/2017 to 02/2018)*
- *Eligibility and Enrollment RFP Development Assistance (10/2015 to 12/2017)*
- *Income Maintenance Manual (IMM) Update Project (09/2016 to 09/2017)*
- *R-MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 07/2017)*
- *Updates to Health Information Technology (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)*
- *RAPIDS (Eligibility System) Transition Facilitation Project (02/2016 to 05/2016)*
- *ICD-10 Transition Planning, Implementation, and Policy Remediation (09/2013 to 03/2016)*
- *Medicaid Eligibility and Enrollment APD (06/2015 to 09/2015)*
- *Provider Enrollment Application (PEA) Project (2012 to 2015)*
- *PPACA Planning, Analysis, and Implementation Support (2012 to 2015)*
- *5010 Refresh Project (2012 to 2015)*
- *MITA 3.0 Organizational Redesign (2013)*
- *Policy Workflow Assessment (2013)*
- *State Medicaid Health IT Planning and Health Care Reform Consulting (2012 to 2014)*

Additional project details are provided below:

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 (MES) modernization initiatives such as the Medicaid performance management and quality assurance, third-party liability (TPL) planning, adding CHIP data to the Medicaid DW, PERM, and the PATH implementation. Nicole's guidance within the APD process has helped WV secure and maintain millions of dollars in federal funding.

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 DW/DSS vendor and implementation of a fully compliant 837 encounter data process with the State's fiscal agent 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.

PATH 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, CHIP, SNAP, 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 Works, deliverables, and risk and issue management.

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EVV Solution Implementation Project (03/2018 to 06/2023)
Nicole led the project team implementing the overall EVV solution. Her work included strategic planning, OCM, requirement development, RFP draft narratives and supporting documentation efforts, certification planning and assistance, APD development and updates, evaluation and scoring support/facilitation, vendor onboarding, vendor deliverable review, and 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 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.

WVCHIP Operational Readiness Review (ORR) (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 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 PHE. 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 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.

MHT MCO Procurement Assistance Project Phases I II (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.

MHP Implementation Project Management Support (03/2020 to 06/2020)

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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 and adoption assistance, as well as those enrolled in the CSED 1915(c) waiver.

MITA 3.0 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 led the organization development planning to support WV's MITA maturity and modernization efforts. The team created 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 took the MITA SS-A findings and focused 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 clarified BMS's short-term and long-term strategic goals and helped BMS request enhanced federal funding to achieve those goals.

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

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

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subject matter knowledge and support.

– New Jersey Division of Medical Assistance and Health Services (DMAHS)
MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 01/2018)
As engagement manager working with DMAHS, New Jersey's single state Medicaid agency, 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 Department of Health and Human Services (DHHS), Maine's single state Medicaid agency, 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 budgets, 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 National Provider Identifier (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

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Shelly Brubaker

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

Shelly Brubaker has 27 years' successful management experience in competitive and diverse environments, including working with adults and children with intellectual disabilities, early childhood education, personnel management, and medical management. She has strong skills developing, refining, and implementing policy and procedures that meet Medicaid and customer standards. She is familiar with directing and participating in developing strategic plans that create new service lines, along with expanding current service options.

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

24 years

PROJECT EXPERIENCE

BerryDunn (11/2022 to present)

– **Kentucky Department for Community-Based Services, Adult Protective Services (APS)**

Comprehensive Statewide Needs Assessment Project Management (12/2024 to present)

As a project manager, Shelly provides project informed management services to the APS team through oversight of risks and issues, analysis of web surveys, hosting and facilitating listening sessions and community forums, participating in biweekly status meetings, oversight in drafting needs assessment, and assisting in the development and writing of APS' state plan on aging.

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

ELIAS Phase II Governance and Project Support (10/2024 to present)

Shelly provides project support to the ELIAS team through monitoring and reporting on key project metrics for the Centers for Medicare & Medicaid Services (CMS). Additionally, she offers OCM guidance, helping ensure that processes align with best practices and strategic objectives.

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

Child Welfare Initiatives Project Management Services (11/2022 to present)

Shelly focuses on statewide child welfare reform to improve outcomes and reduce unnecessary out-of-home placements. The child welfare effort requires cross agency collaboration with BSS, BMS, and the Bureau for Behavioral Health (BBH).

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This multiyear project includes program and process improvement in the residential model continuum of care. Shelly works with BSS staff and community stakeholders to help ensure children receive the least restrictive appropriate intervention.

– **Mississippi Department of Rehabilitation Services (MDRS)**

Comprehensive Statewide Needs Assessment Project Management Services (02/2024 to 11/2024)

Shelly provided project management services to the MDRS Offices of Vocational Rehabilitation and Office of Vocational Rehabilitation for the Blind by completing background documentation reviews, creating and analyzing web surveys, hosting discovery sessions, participating in biweekly status meetings, and creating presentations to help MDRS as they looked to gain critical information to assist in writing their state plan for rehabilitation services.

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

Statewide Needs Assessment and State Plan (01/2024 to 05/2024)

Shelly provided project management services to DAIL by completing background documentation reviews, creating and analyzing web surveys, hosting discovery sessions, facilitating in-person community forums, participating in weekly status meetings, creating presentations, drafting needs assessments, and assisting in the development and writing of DAIL's state plan on aging. These activities helped to define a path forward for DAIL for the next four years.

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

Workforce Development Needs Assessment (10/2023 01/2024)

Shelly served as an Aging and Disabled SME on this project. Key project activities include planning and facilitating stakeholder discovery sessions—including with adult and aging entities—and web surveys, conducting other state research, exploring existing funding opportunities to support workforce development, developing assessment findings, and performing an assessment report.

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

Health Care Institutions (HCIs) Operational Assessment (05/2023 to 10/2023)

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

Sevita (07/2021 to 11/2022)

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

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systems through Gainwell, and monitored contract compliance.

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

– Executive Director (02/2019 to 06/2021)

Shelly oversaw the operational outcomes for Idaho, Oregon, and Nevada, as well monitored contracts in eight cities and provided direct supervision to nine management level staff, 1,011 direct support staff, and 342 participants. She participated in community activities and committees dedicated to providing opportunities to individuals with intellectual disabilities, including current Idaho Association of Community Providers residential habilitation subgroup director. She also met regularly with external partners including licensing and Idaho DOH and Welfare's Medicaid team on initiatives such as Negotiated Rule Making Rate Setting Methodology, policy development, and other key topics.

– Idaho State Director (12/2013 to 01/2019)

Shelly oversaw operational outcomes, worked in conjunction with external and internal customers to identify areas of deficiencies, developed plans of actions to rectify situations in a timely and efficient manner, and provided extensive time and hands on commitment to transitioning multiple locations in workflow and process changes. She participated in regular quarterly meetings with the Idaho DOH and Welfare Medicaid team and licensing partners to better understand needs and to help ensure open lines of communication. She created teams and leaders that are committed to providing exceptional quality and customer service, as well as participated in professional coaching sessions that enhanced personal leadership skills and allowed the opportunity to work to develop team members and build on their strengths.

– Operations Manager (11/2012 to 11/2013)

Shelly oversaw operational outcomes for five regions, four cities, and three service lines, collaborated with external customers to identify areas of deficiencies and develop plans of actions to rectify situations in a timely and efficient manner, and participated in community activities and committees that are committed to providing opportunities to individuals with intellectual disabilities, including Collaborative Work Group, Consortium of Idahoans with Disabilities, and Idaho Association of Community Providers. She provided extensive time and hands on commitment to transitioning multiple locations in workflow and process changes.

– City Director (02/2012 to 10/2012)

Shelly oversaw operational outcomes, partnered with external customers in accordance with Idaho Administrative Procedures Act (IDAPA) to strengthen their Intermediate Care Facilities/Intellectual Disabilities programs and bring them into consistent reporting compliance, and assisted in locating and participating in weekly project management activities of new office location. She participated in multiple committee activities within the company and in the community that led us to enhanced services and as a key player in the Developmental Disability field.

– Branch Manager/Marketing and Business Development Director (07/2007 to 01/2012)

Shelly worked with a strategic planning team to create annual budgets, including fiscal plans, referrals, recruitment, and marketing. She supervised management staff with scheduling, recruitment, training, and coaching. She submitted accurate payroll and billing weekly and other detailed monthly reports covering outcomes, growth, and profitability. Shelly also maintained partnerships and communication with Department of Health and Welfare licensing, Medicaid, and targeted service coordination agencies to help ensure customer satisfaction.

– Branch Manager/Human Resources Assistant (10/2001 to 03/2006)

Shelly oversaw the day-to-day operations of $875,000 branch office, provided quality customer

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services to adults with developmental disabilities, and worked in conjunction with a strategic planning team to create annual budgets, which included fiscal plans, referrals, recruitment, and marketing. She helped to ensure compliance with all Equal Employment Opportunity Commission, Operational Safety and Health Administration, HIPAA standards, and state regulations and contracts.

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

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

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Lloyd Butler, MS

SENIOR PROGRAMMER/ANALYST
Berry, Dunn, McNeil & Parker, LLC

Lloyd Butler is a senior consultant in the Health Analytics Practice at BerryDunn. He is an experienced data and IT professional with efficient programming, process and project management, business intelligence, and cybersecurity skills. Lloyd works collaboratively with clients to help them design and implement a shared vision. He has extensive experience working with and building relationships with a wide range of stakeholders.

EDUCATION AND CERTIFICATIONS

MS, Mathematics, Northeastern University

BS, Mathematics-Computer Science, Ithaca College

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

12 years

KEY QUALIFICATIONS

- Applications: Microsoft Visual Studio, SQL Server Integration Services, SQL Server Management Studio, SQL Developer, Git, Asana, Jira®, Slack, Sisense, Okta, SharePoint, Microsoft Office

- Languages: SAS, SQL, Python, Bash, PL/SQL, Perl, JavaScript, CSS, HTML, XML, VBScript (Active Server Pages), Visual Basic, VB for Applications, Java, C++, C#

- Project management experience including leader in agile, using daily standups, sprint planning and release planning.

PROJECT EXPERIENCE

BerryDunn (12/2020 to present)

Lloyd works with clients to improve their workflows and quality of work. Given existing applications, he finds ways to increase their efficiency and complete their original vision. This requires teasing out business requirements, analyzing data, and understanding quality needs, as well as designing and implementing the solution. Lloyd deftly moves between various tools to complete these ends, including SQL Server, Oracle, and SAS.

– West Virginia Department of Human Services (DoHS)

CWI Project Management Services (01/2021 to present)
Lloyd supports the CWI project through the data life cycle needed for the project. He meets regularly with data providers, analysts, and cross-bureau teams including BMS, BBH, BSS, and the Office of Quality Assurance. He receives cross-bureau and provider level data, designs the data mart, writes code to load and transform the data, performs cross-bureau ad hoc analysis, and supports the team with project management and internal process improvement.

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– West Virginia Bureau for Medical Services (BMS)

Data Improvement Project (DIP) (10/2021 to 10/2022)
Lloyd loaded and organized raw X12 Electronic Data Interchange (EDI) into a data store for the analytic team to consume. This required using Mirth to consume and transform the data into a useable form. He worked with the analysts to understand their data storage requirements and review of the final data store.

High Value Healthcare Collaborative (HVHC), Dartmouth College (2013 to 2020)
As a senior manager of IT operations, Lloyd wrote and suggested improvements to complex SAS and SQL code. In his role as infrastructure manager, he was responsible for server environment stability and security and maintained all server-based software installations. Lloyd managed external vendors when conducting security assessments, audits, penetration tests, and other activities necessary to secure HVHC data. He was also responsible for overseeing the implementation of security improvements to maintain strict Centers for Medicare & Medicaid Services (CMS) requirements and for developing and maintaining security plans and related documents. Lloyd was an effective and collaborative mentor to analysts and programmers.

Northern New England Accountable Care Collaborative, Dartmouth College (2012 to 2015)
Lloyd served as a lead programmer and technical liaison, managing a wide variety of IT, analytic, and business tasks to support the start-up from the onset. He worked closely with a consultant company to implement a new web-based patient care product, and he managed technical relationships with multiple clients and vendors. Lloyd also provided day-to-day technical and user support for co-workers and worked closely with leadership to legally wind-down the organization.

Health Dialog (2005 to 2012)
Lloyd served as programmer/analyst for Health Dialog where he supported Maine's single state Medicaid Program, MaineCare. In this role, Lloyd was the designer and programmer of a Physician Performance Measurement System (PPMS). The PPMS was used to generate reports for Maine Patient Centered Medical Home programs. Lloyd was responsible for bimonthly PPMS releases (testing, change request management, rollout) and documented PPMS and presented technical aspects of PPMS to company departments. In addition, Lloyd implemented Healthcare Effectiveness Data and Information Set (HEDIS) and proprietary measures for use by PPMS and worked with the operations team to make HEDIS measures available company wide. Lloyd also wrote stock programs to aid in analysis and streamlined existing processes to improve efficiency and usability.

Anteon (now General Dynamics Information Technology) (2003 to 2005)
While at Anteon, Lloyd was exposed to and adapted quickly to new technologies and served as a liaison between government customers and the project team. As a research mathematician and programmer, he was responsible for analyzing, coding, and modifying mathematical models for military use.

Erie Scientific (2000 to 2003)
As a quality control consultant, Lloyd created and modified advanced Excel workbooks and Access databases to improve worker efficiency and assist with quality assurance. Lloyd worked closely with users, training them on how to use these tools most effectively. He also wrote and tested validation suites for Food and Drug Administration (FDA) controlled databases.

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Eduardo "Ed" Daranyi, M.Ed., PMP®

PRINCIPAL
Berry, Dunn, McNeil & Parker, LLC

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

EDUCATION AND CERTIFICATIONS

M.Ed., Education, Lesley College

BS, Physics, Mathematics, Business Administration, Hillsdale College

Certified Project Management Professional® (PMP®)

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

24 years

KEY QUALIFICATIONS

- Senior project management professional, providing principal oversight in over 100 Medicaid projects, leading BerryDunn's MPG with a management team of 34 and over 134 full-time consultants

- 25 years of project manager experience, including 17 years as a Certified PMP®

- Nearly 20 years of HHS and Medicaid consulting experience on small and large projects, some impacting up to 60% of a state's population

- Over 10 years' experience working as a consultant, engagement manager and project manager for WV 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 capacity

PROJECT EXPERIENCE

BerryDunn (09/2005 to present)
Principal – 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

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consultants in 2005 to over 135 team members in 2024. His role as the MPG lead involves 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 client engagement support. He helps ensure that all projects are successful and 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), 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 BerryDunn's 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 serves 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 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 BMS to provide project management services for multiple projects, including the eligibility and enrollment system modernization, Molina Health PAS MMIS implementation; Medicaid DW/DSS implementation; SUD 1115 Waiver development and implementation; ACA planning, analysis, and advisory services; procurement projects; ICD-10 implementation; Adult Quality Measures; CMS APD; CHIP claims system planning, implementation, and stabilization; access to care planning and monitoring; provider re-enrollment; state self-assessments (SS-As); and other related initiatives.

Since Ed joined the WV 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, he took responsibility for stabilizing and growing the local Charleston office to now employ over 25 local staff. Ed has overseen over 100 projects for WV, several of which are described below. He now contributes to WV as a contributing principal, assisting in oversight of the many ongoing projects in that engagement.

SUD Waiver Initiative Project (02/2016 to present)

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

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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 SS-As (2.0 and 3.0) and roadmap 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 Project (2012 to present)

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 RFPs, 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.

WVCHIP Operational Readiness Review (ORR) (2019 to 2022)

Ed was the engagement manager overseeing the State's transition of the WVCHIP program from FFS 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 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, provided strategic direction and

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oversight to the project team implementing the largest information technology transformation project that WV has ever undertaken, the Medicaid enterprise IES, known as PATH. PATH supports the eligibility, enrollment, and administration of the DoHS's human services programs, including Medicaid, CHIP, SNAP, TANF, LIEAP, Child Welfare, and Child Support. Ed provided executive leadership working with the internal team, the State, and all vendors, helping ensure that all project deliverables were met, and risks and issues were appropriately escalated and addressed.

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

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

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)*
- *SUD Waiver Initiative Project (03/2019 to 05/2021)*
- *Technical Assistance and Program Support Project (TAPS) (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)*
- *MCO Transition Phase II (03/2020 to 02/2021)*
- *WVCHIP MCO ORR 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)*
- *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)*
- *1915(c) CSED Waiver Development Project 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)*
- *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 Application (PEA) Project (2012 to 2015; 03/2017 to 02/2018; 05/2018 to 05/2019)*

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- *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)*

- *WV/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 WV 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 APD Update (08/2015 to 11/2016)*

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

- *ICD-10 Transition Planning, Implementation, and Policy Remediation (09/2013 to 03/2016)*

- *Eligibility and Enrollment APD (06/2015 to 09/2015)*

- *PPACA Planning, Analysis, and Implementation Support (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) Independent Validation & Verification Services (12/2016 to 06/2018)

BerryDunn provided IV&V support for ODM in implementing its vision for a modular MMIS in the Ohio Medicaid Enterprise System project. 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,

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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. 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 (TA) Services (04/2008 to 06/2012)

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

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 EPMO (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 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 adjust their teams and processes, developing a plan based on the outcomes of our reporting.

– Martin's Point Health Care

HIPAA Compliance Planning and Implementation (2005 to 2007)

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

Goold Health Systems (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

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result of the growth experienced while working as a strategic project manager, and in his office manager role, Ed oversaw a move of 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 (DHS)

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, working with DHS, Iowa's single state Medicaid agency. 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, working with DHHS, Maine's single state Medicaid agency. 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)

- Moderator, MESC Conference sessions (2015-2019)

- *People and processes: Planning health and human services IT systems modernization to improve outcomes,* 11/23/2020 Blog

- Published Insights on www.berrydunn.com include but are not limited to: *NAMD 2020 reflections: Together towards the future and MESC 2020, 2021, 2022, and 2023 reflections*

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Jennifer Elwood, FSA, MAAA, FCA

PRINCIPAL AND CONSULTING ACTUARY
Berry, Dunn, McNeil & Parker, LLC

Jennifer Elwood is a principal at BerryDunn and oversees the firm's Health Analytics Practice Group providing leadership and guidance to the team of actuaries, data scientists, economists, and health policy professionals. She has more than 25 years of experience as a healthcare actuary across a wide range of actuarial functions. Her experience includes projecting population cost experience and risk for pricing and risk sharing, especially in new initiatives, including extensive work related to implementing the ACA in commercial insurance, and projecting the state-level impact of expanding the Medicaid population. She also has experience analyzing risk-sharing arrangements, performing claim liability analysis, rate development, budget development, and financial monitoring.

EDUCATION AND CERTIFICATIONS

MS, Statistics, University of Connecticut

BS, Mathematics – Statistics and Psychology, University of Connecticut

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

6 years

AFFILIATIONS AND MEMBERSHIPS

- Fellow, Society of Actuaries (FSA)
- Member, American Academy of Actuaries (MAAA)
- Fellow Consulting Actuary (FCA)
- American Academy of Actuaries Health Equity Committee (2021 – present)
- Blue Cross and Blue Shield Actuarial and Underwriting Committee (District I) (2010 to 2014)

KEY QUALIFICATIONS

- Over 25 years of health analytics and actuarial experience
- Fellow of the Society of Actuaries
- Member of the American Academy of Actuaries

PROJECT EXPERIENCE

BerryDunn (formerly Compass Health Analytics) (08/2014 To present)

As a principal and co-leader of BerryDunn's actuarial services, Jennifer assists nonprofit MCOs with claim liability analysis, rate development, budget development, and financial monitoring. She works with her clients to develop large employer claims projections, estimate the impact of proposed benefit mandates for state government policy makers, and assist state regulators with market conduct rate review audits.

– West Virginia Bureau for Medical Services (BMS)

Technical Assistance and Program Support Project (TAPS) (05/2022 to present)
As a SME, Jennifer has contributed knowledge and analysis to task requests. Jennifer also coordinates and leads research and tasks that fall under the scope of TAPS, such as the review and impact analyses of Centers for Medicare & Medicaid Services (CMS) rules that requires financial knowledge.

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- Society of Actuaries – Grading and Question Writing, Core Exam (2012 to 2019)
- Health Reinsurance Association / Connecticut Small Employer Health Reinsurance Pool Actuarial Committee (2010 to 2014)
- New Hampshire Small Employer Health Reinsurance Pool Board (2009 to 2011)

Substance Use Disorder (SUD) Waiver Initiative Project (07/2021 to present)
Jennifer provides subject matter expertise and data analytic support to assist the State in understanding and addressing data quality and usability issues affecting its SUD Waiver initiatives.

Data Improvement Project (DIP) (05/2023 to 02/2024)
Jennifer provides subject matter expertise and data analytic support to assist the State in understanding and addressing data quality and usability issues affecting its Medicaid program.

Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (05/2021 to 02/2022)
Jennifer provided subject matter expertise and data analytic support to assist the State in understanding and addressing data quality and usability issues affecting its Medicaid program.

Project Management and Support Services for the Access to Care Project Monitoring Phase (04/2018 to 04/2021)
Jennifer provided subject matter expertise and data analytic support to assist the State in understanding and addressing data quality and usability issues affecting its Access to Care initiatives.

– **Community HealthChoices**

Actuarial Services Including Rate Review, Valuation, and Forecasting (2019 to present)
Jennifer provides consultative actuarial services to a large MLTSS managed Medicaid organization. These services include actuarial liability valuations, rate offer assessments, forecasting, strategic consulting, and ad hoc analyses.

– **Community Care Behavioral Health**

Actuarial Services Including Rate Review/Pricing, Valuation, and Forecasting (2008 to present)
Jennifer is one of three actuaries providing actuarial services to a large behavioral health managed Medicaid organization. These services, which she began providing in 2015, include actuarial liability valuations, capitation rate proposals, rate offer assessments and negotiations, forecasting, and ad hoc analyses.

– **Massachusetts Center for Health Information and Analysis**

Mandated Benefit Reviews (approximately 2004 to present)
Jennifer is the lead actuary on mandated benefit review projects (from 2015 to present). The actuarial component of the mandate review estimates the impacts to insurance premiums of proposed insurance mandate bills before the Massachusetts legislature. In addition, statutory and clinical analysis are provided by BerryDunn as part of the report.

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WellPoint, Inc. (1998 to 08/2014)

- **Northeast Regional Pricing Director (2012 to 2014)**

Jennifer was responsible for individual and commercial pricing function in Connecticut, Maine, and New Hampshire, managing a team of three state pricing directors and seven analysts. She coordinated rate development and preparation of rate filings and certifications for individual and commercial business; collaborated with state and regional leadership to achieve profitability and membership goals; provided strategic guidance to state pricing directors; and helped to ensure corporate directives were met while balancing state objectives.

- **Northeast Regional Lead and Connecticut Pricing Director (2010 to 2012)**

Jennifer was responsible for commercial pricing function in Connecticut and managing a pool of seven analysts supporting the pricing needs of Connecticut, Maine, and New Hampshire. She supported the Connecticut State President as a strategic business partner and primary actuarial point of contact for internal and external constituents; participated in quarterly forecast and annual planning process; and served as the actuarial representative for ongoing Connecticut Exchange Board and Department of Insurance meetings with health insurance carriers.

- **Northeast Valuation Director (2008 to 2010)**

Jennifer was responsible for the valuation function in Connecticut, Maine, and New Hampshire. She managed staff of eight associates responsible for estimating claim liabilities and other reserves for commercial, consumer, and FEP business; directed development of statutory and GAAP reporting, including support of actuarial certification and SOX control testing and certifications; and coordinated actuarial portion of external audits and supported DOI audits.

- **Northeast Forecasting Director (2006 to 2008)**

Jennifer was responsible for forecasting commercial and individual business in Connecticut, Maine, and New Hampshire. She managed staff of five associates responsible for developing the annual budget, quarterly forecasts, and detailed monthly variance analysis; and acted in a peer review capacity by fully developing all assumptions and reconciling them with ongoing pricing and valuation development.

- **Connecticut and New York Forecast Lead (2001 to 2006)**

Jennifer developed the annual budget and quarterly forecasts for the Connecticut Commercial Business and Anthem Health and Life of New York. She provided key financial information to executive management through forecast modeling and analysis of monthly results, and developed and enhanced forecasting models to increase speed and accuracy of forecast process.

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Chris Fanikos, MPH

SENIOR CONSULTANT
Berry, Dunn, McNeil & Parker, LLC

Chris Fanikos is an experienced public health professional with experience in corporate, healthcare, and educational organizations. He has developed skills in research, data analysis, project management, and program development. He has worked with various data models to develop and understand data relating to Medicaid, health policy, and behavioral health.

EDUCATION AND CERTIFICATIONS

MPH, Public Health Policy, Yale University

BA, History and Middle Eastern & Islamic Studies, New York University

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

5 Years

KEY QUALIFICATIONS

- Data professional with experience in architecture, engineering, and analysis
- Over five years of project management experience in Agile, including serving as scrum leader
- Five years of experience collaborating for State Medicaid Agencies in Puerto Rico, WV, and Connecticut

PROJECT EXPERIENCE

BerryDunn (11/2021 to present)
– Missouri Department of Labor & Industrial Relations (DOLIR)

Tips and Complaints Portal (08/2024 to present)
Chris serves as a business intelligence SME for the Tips and Complains Portal project. In this role, he has collaborated with DOLIR leadership in developing a proposed reporting paradigm for the State's tips and complains portal, including the development of department-wide and business process-specific metrics, operational dashboards, and reports.

– New Jersey Department of Human Services (DHS)

Medicaid Management Information System Modernization (12/2023 to present)
Chris serves as senior data and business intelligence engineer for the NJ DHS MMIS Modernization project. In this role, he has worked with NJ DHS leadership in designing, developing, and implementing a reporting solution for the State's MES outcomes and metrics. This work has involved building a modern, automated, cloud-based data collection, ETL, and visualization platform using a combination of Amazon Web Services (AWS), Snowflake, and Tableau.

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– West Virginia Bureau for Medical Services (BMS)

Software Development Lifecycle (SDLC) Coordination (06/2023 to present)
Chris serves as an analyst and project management support on the SDLC project. He is the primary Atlassian (Jira®®, Confluence) engineer. He supports the project by helping to ensure that both BerryDunn and State team members have the requisite project management tools to support the SDLC efforts.

Data Improvement Project (DIP) (05/2022 to 06/2023)
Chris served as an analyst on the DIP project, wherein he assisted the State in analyzing the quality of data stored within its EDS and identifying opportunities for improving that quality. In this role, Chris worked extensively within the client's data environment, crafting structured approaches to analyzing large volumes of data and running complex SQL queries to support this.

– Northern Bank & Trust

Current Expected Credit Loss (CECL) Modeling (07/2022 to present)
Chris serves as a CECL modeling consultant. In this role, Chris performs financial data and statistical modeling validation using a variety of analytic tools and platforms, including SAS, R (programming language), and Python.

– Community Care Behavioral Health (CCBH)

Actuarial Services (11/2021 to present)
Chris serves as a technical resource for the CCBH Actuarial Services project. In this role, Chris has designed and implemented a financial reporting solution to help the client identify and act on discrepancies between eligible payments and received capitation for their patient population. Chris has also served as a technical resource for the client's migration of their financial data mart's ETL engine to SAS Data Integration.

– West Virginia Bureau for Social Services (BSS)

Quality Assurance and Performance Improvement (QAPI) & CWI (11/2021 to present)
Chris services as a senior data and analytic resource as part of the QAPI/CWI project. In this role, Chris performs various technical tasks, including data collection and modeling, data architecting, ETL development, data quality exercises, database management, and data analysis. Chris employs a range of tools for this work, including Microsoft SQL Server, SAS, SQL Server Integration Services, Tableau, PowerBI, and more. Chris also serves as a business lead, wherein he manages the team's Agile approach to development through sprints.

University of Connecticut, Analytics & Information Management Solutions (AIMS) (08/2019 to 11/2021)

– Solutions Analyst (01/2021 to 11/2021)
Chris developed data pipelines using Microsoft Azure services (Blob storage containers, Azure Data Factory, Azure Databricks) and NextGen (Mirth) Connect for ingesting and parsing clinical data to aid the Connecticut Single State Medicaid Agency, the Department of Social Services (DSS), in analyzing the impact of COVID-19 and State telehealth policies on utilization and clinical outcomes among Medicaid beneficiaries. Chris ingested, parsed, cleaned, and profiled ~2.1 million Consolidated Clinical Document Architecture (C-CDA) files from Connecticut Federally Qualified Health Centers (FQHCs). He designed and implemented analytic data models using ingested clinical data, and developed interactive, dynamic Tableau dashboards using these models to meet stakeholder-defined analytic requirements, including time trend and geospatial analyses.

– Health Policy and Business Analyst (08/2019 to 01/2021)

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

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

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

HAVEN Free Clinic (12/2017 to 02/2019)

Chris worked as the Co-Director of Pharmacy to manage all aspects of the clinic's pharmacy, including maintaining the in-house formulary, overseeing medication dispensing, consulting with medical teams on cost-benefit decisions, and helping to ensure volunteer and patient satisfaction. He developed and conducted internal quality improvement projects on fill/delivery efficiency and medication adherence.

Rennert International (08/2015 to 08/2017)

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

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Melissa Hicks, MA, LSSBB

SENIOR CONSULTANT
Berry, Dunn, McNeil & Parker, LLC

EDUCATION AND CERTIFICATIONS

MA, International Relations, Hult International Business School

BA, Cultural Anthropology, Northern Arizona University

Lean Six Sigma Black Belt (LSSBB)

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

7 years

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

PROJECT EXPERIENCE

BerryDunn (07/2022 to present)

– Iowa Department of Health and Human Services (IA HHS)

CCWIS Procurement (01/2025 to present)

Melissa is serving as the lead business analyst on this project engaging in discussions regarding the needs of the Department and the alignment of the federal CCWIS requirements to create a request for information (RFI) in support of child welfare work and supporting IA HHS in the selection of a vendor. Melissa is helping to ensure that IA HHS has the requirements needed for the CCWIS solution, helping ensure compliance with the Administration for Children and Families (ACF) and IA HHS identify available CCWIS solutions and vendor that best meets the agency's needs.

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– Montana Department of Public Health and Human Services (DPHHS), Child and Family Services Division (CFSD)

Business Process Mapping for CCWIS Procurement (05/2024 to present)

Melissa serves as a lead program analyst on this engagement. To aid CFSD in their preparation for implementing a CCWIS, Melissa provides project management services, business process mapping, and process inventory development. Melissa has also developed a process gap analysis, an assessment of training and communications plans, and a risk register to support CFSD in their implementation preparation efforts.

– West Virginia Department of Human Services (DoHS)

Child Welfare Initiatives Project Management Services (07/2022 to present)

Melissa serves as a general project manager on this engagement. Melissa provides project management services, needs assessment/gap analyses, business process analyses/redesign, guidance on CQI, and oversight of program implementation related to child welfare for WV. Melissa collaborates with BMS to help ensure Medicaid waiver and state plan service materials are updated consistently and aligned appropriately across the Department through regular meetings, policy and programmatic material updates, and program data reviews.

– Arizona Department of Health Services (ADHS)

Health Care Institutions (HCIs) Operational Assessment (06/2023 to 11/2023)

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

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

– Management Analyst (04/2018 to 07/2022)

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

– Program Specialist (04/2017 to 04/2018)

Melissa developed pilot versions of Section Huddle Board and Visual Process Adherence tools, allowing management to have data-based conversations around continuous improvement and problem-solving. She produced reports and data visualization in Excel using Tableau, Access databases, and statewide databases to identify trends and validate data entry, reducing error rate by 60%. Data reviewed and utilized included AFCARS, CANS, and court systems database data, as well as internal Department KPIs. Melissa also reviewed and analyzed AHCCCS data to help ensure adherence to established processes and policies. She created and led lean management,

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data analysis, and problem-solving training for agency leadership and conducted case reviews using Child and Family Services Review (CFSR) indicators and compiled findings for management review. She also performed supervisory duties, including staffing with child safety specialists to determine child safety, and reviewing documentation of specialists' findings and reports to the courts.

— Child Safety Specialist (05/2014 to 04/2017)

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

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

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

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

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

Naturopaths International (03/2008 to 06/2010)

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

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EDUCATION AND CERTIFICATIONS

MPH, Biostatistics University of South Florida

MS, Demography, East China Normal University

BS, Economics, China Youth University of Political Sciences

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

4.5 years

Yang Ji, MS, MPH

SENIOR MANAGER
Berry, Dunn, McNeil & Parker, LLC

With two decades of experience in healthcare data analytics, Yang Ji brings extensive expertise in the application of data management, business intelligence, and analytics to healthcare data ecosystems and financial, operational, and clinical domains to support BerryDunn's Health Analytics Practice Group (HAPG) clients. A senior manager and co-lead of BerryDunn's Data Management and Strategy Practice, Yang helps government agencies, managed care, and provider organization clients discover, plan, design, and implement data management, warehousing, and analytics strategies and solutions.

KEY QUALIFICATIONS

- 20 years' experience in government healthcare program and payer data management, business intelligence, and analytics
- Enterprise decision support system and data warehousing architect and strategic planning expert
- Expert of formulating and instituting analytics plans and functions
- Technical expert of database, ETL, reporting, analytic programming, and data visualization development

PROJECT EXPERIENCE

BerryDunn (09/2018 to present)
– West Virginia Department of Human Services (DoHS) (09/2020 to present)

- Child Welfare Initiatives (CWI) Project (09/2020 to present)

Yang leads the project scoping, planning, management and directs a team of staff supporting all aspects of data, reporting activities and the build-out of a data store and dashboard system for DoHS's BSS. Yang supports the CWI project through the entire data lifecycle, i.e., system and program data collection, data QA, data transfer/exchange setup, and data integration solution build needed for the project. He meets regularly with data providers, analysts, and cross-bureau teams, including WV's single state Medicaid agency, BMS, BBH, BSS, and the Office of Quality Assurance for Children's Programs (OQA).

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– Alaska Department of Health (DOH) Division of Behavioral Health (DBH) (11/2024 to present)

Yang serves as the engagement manager and technical lead for a proof-of-concept and comprehensive behavioral health claim analysis project. Yang directs a team of claim analysis SMEs, health economists, and data analysts to help DBH identify systematic patterns of claim adjudication/payment and data management and business intelligence experts to develop a repeatable claim data analytics process to be deployed at scale for DBH's retrospective and prospective claim analysis/ monitoring.

– Medicaid Behavioral Health Managed Care Organization (MCO) (09/2018 to 09/2021)

Yang served as the engagement manager, data architect, and data strategy advisor to the MCO. His work included roadmap planning, requirement discovery, data model design, project steering, and management to help clients strategize and implement data management and analytics solutions, i.e., data warehouse, specialized data mart, operational data store, data lake, and the business intelligence layer to deliver reporting and analytical tools. With extensive content knowledge in healthcare programs, Yang also directed data analysis plans and provides deep financial and operational insights to the MCO client.

– Health Insurer and Exchange Participant (09/2018 to 03/2021)

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

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

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

Blue Cross Blue Shield of Arizona Advantage (05/2016 to 09/2018)
As head of the data analytics and business intelligence department, Yang managed enterprise end-to-end data, reporting, and analytics functions. He oversaw the entire data management and reporting operations in supporting CMS compliance reporting, HEDIS, STAR rating, risk adjustment revenue, and FWA functions/initiatives. He chaired enterprise data governance and reporting review/steering committees.

Wellcare Health Plans Inc. (08/2010 to 05/2016)
Yang served as a lead analytics programmer and oversaw profitability data and reporting function for 11 markets and 26 lines of business in supporting companies' financial close. He also managed a broad data analytics portfolio in supporting actuarial reserving and forecasting, risk adjustment revenue, and quality of care reporting.

University of South Florida (07/2005 to 05/2010)
Serving as a research associate with the State Data Center on Aging and the Florida Mental Health Institute, Yang led the build of a data mart and conducted research on the cost-effectiveness and health outcome of Florida Medicaid waiver programs and authored and presented working papers at regional and national conferences.

b, BerryDunn

Danielle Joslyn

SENIOR CONSULTANT
Berry, Dunn, McNeil & Parker, LLC

Danielle Joslyn is an experienced healthcare data analyst and project manager with excellent data analysis and evaluation skills. She is highly skilled with the management of patient claim information, building data warehouses, and performing data analysis in SAS and Microsoft SQL based environments, and has the proven ability to implement and manage multiple projects while maintaining high quality standards and providing value-added service to the client. She has demonstrated leadership experience in team-based environments, as well as the ability to work independently, to develop new processes and strategies to meet client needs.

EDUCATION AND CERTIFICATIONS

BA, Mathematics, University of Southern Maine

Certified Project Management Professional® (PMP®)

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

16 Years

KEY QUALIFICATIONS

- Over 18 years as a healthcare data professional
- Over five years leading projects related to new client implementations, data analysis, and systems development.
- Skilled in Agile methodology

PROJECT EXPERIENCE

BerryDunn (11/2021 to present)
– Alaska Division of Behavioral Health (DBH)

Claims Analysis (01/2025 to present)
Danielle provides project management and claims analysis support for the Administrative Services Only (ASO) vendor claims analysis to support DBH in reviewing improperly denied or overpaid claims.

– Iowa Department of Health and Human Services (IA HHS)

Quality Management System (12/2024 to present)
Danielle is the technical project manager for the development of quality measures to support HHS' goal of improving the delivery of community-based supports for behavioral health, disability, and aging services.

– West Virginia Bureau for Medical Services (BMS)

Data Improvement Project (DIP) (11/2021 to present)
Danielle provides technical analytic support for the project that assists the State in understanding and addressing data quality and usability issues affecting its Medicaid program.

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Data Integration Hub (05/2024 to 10/2024)
Danielle provided project management and data analysis support for the design and implementation of a Data Integration Hub.
– West Virginia Department of Human Services (DoHS) (11/2021 to present)

Danielle provides project management and data analysis support for the architecture design and technical implementation of a comprehensive data store, reporting, and dashboard system for DoHS' Bureau for Children and Families (BCF).

– Unnamed State Medicaid Agency (To protect client confidentiality)

Forensic Accounting and Auditing Services (05/2023 to 08/2024)
Danielle was the lead data analyst for the fraud, waste, and abuse investigation. Danielle performed review of behavioral health claims data and review of payment activity post reimbursement to providers.

Cotiviti (10/2016 to 11/2021)
Danielle worked as a senior implementation manager and product manager to coordinate and manage projects for new clients and existing client expansions, including maintaining project timeline, gathering project requirements, developing project plans and milestones, performing data analysis on incoming client data, and performing post-payment medical claim audits. She participated in and managed projects for a wide range of health plans including Commercial, Medicare Advantage and Medicaid MCOs. As part of new client implementations, Danielle participated in payment integrity claim audits for multiple lines of business including, Commercial plans, Medicare Advantage plans, and State Medicaid Agencies including New York, Texas, Illinois, and New Mexico. The medical audits included review of the following: fee schedule rate adherence review, state-specific policy review, duplicate claim submissions, processing errors, coding and billing standards, and coordination of benefits. For fee schedule rate adherence review, Danielle would perform analysis of claim payments against the contracted rates to confirm claims were paid appropriately and follow the payment schedule. If any issues were identified, she would work with the health plan or MCO to rectify the issues. For state-specific policy review, Danielle would review and interpret a state policy and then analyze claims data to help ensure claims were paid and processed per policy requirements. If any discrepancies were identified, she would work with the State SME, the health plan, or the MCO to confirm that her interpretation of the policy is correct and review the claims that were not in compliance with the policy. For processing errors and coding / billing standards, Danielle would utilize data analytics to identify claims that appear to be processed incorrectly (incorrect units, incorrect length of stay, incorrect provider identifier used, etc.) and/or had improper coding / billing codes (outpatient claims that had incorrect revenue code / Current Procedural Terminology (CPT) code combinations causing higher payment, assistant surgeon / co surgeon claims with incorrect modifiers / payment, etc.). Any claims that were identified as potential outliers would have a thorough audit performed to confirm if issues are present and understand the scope of the issue. She developed queries to analyze client data to help ensure the data met product needs, maintained all Jira®® features/stories, and coordinated priority with the Retrospective Business. She participated in all program increment planning activities in an Agile team environment, coordinated internal resources for weekly checkpoints to help ensure timely completion of project tasks, and developed standardized data analysis tools for the implementation team to perform data analysis and validation. Danielle also identified opportunities to streamline the implementation process and build standard client toolsets, mentored Implementation Analysts on their assigned projects, and liaised for the implementation team with Research & Development, Operations, Data Management, Go-to-Market, and Product.

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RxAnte (09/2015 to 09/2016)

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

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

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

Health Dialog (02/2007 to 01/2012)

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

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Emily E. McCoy, RN, BSN, PMP®

SENIOR MANAGER
Berry, Dunn, McNeil & Parker, LLC

Emily McCoy is an experienced project manager and registered nurse with deep expertise in healthcare consulting, including long-term care (LTC) and Medicaid/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 HHS agencies, of which over 13 years was spent working in Medicaid and MMIS as an employee of the WV DoHS.

EDUCATION AND CERTIFICATIONS

BS, Nursing, Marshall University

Registered Nurse

Certified Project Management Professional® (PMP®)

Executive Coaching Certification

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

22 years

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 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

- DDI experience with four large-scale MMIS implementations, in various roles, such as LTC SME, 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

- Experience leading enterprise-wide portfolio management

- 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.

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- Served on the Outcomes-Based State Self-Assessment (SSA) Workgroup through the PSTG

PROJECT EXPERIENCE

BerryDunn (07/2016 to present)

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

– West Virginia Department of Health Facilities (DHF)

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

– West Virginia 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/WVCHIP projects. Portfolios, programs, and projects include:

- *Organizational Development Phase II (07/2024 to present)*
- *IT Control Environment Review (07/2024 to present)*
- *Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project Phases IV and V (11/2023 to present)*
- *System Development Lifecycle (SDLC) Coordination Project Phase I (06/2024 to present)*
- *Medicaid and WVCHIP Enterprise System (MCES) Procurement Assistance Project Phase II (06/2024 to present)*
- *Medicaid Information Technology Architecture (MITA) SS-A Maintenance and Annual Update Assistance Project (06/2024 to present)*
- *APD Assistance Phase II (06/2024 to present)*
- *Partnership Management Support Project Phase II (06/2024 to present)*
- *Payment Error Rate Measurement (PERM) Project Reporting Year (RY) 2026 (06/2024 to present)*
- *Technical and Program Support Project (TAPS) Phases V and VI (11/2023 to present)*
- *PATH Project Management Phase III (06/2024 to present)*
- *Child Welfare Initiatives Project Management Services Phase V (06/2024 to present)*
- *State Plan Review and Support Project Phase II (06/2024 to present)*
- *ARPA Section 9817: Home and Community Services (HCBS) Implementation Project Phase II (06/2024 to present)*
- *Certified Community Behavioral Health Clinics (CCBHCs) State Plan Amendment (SPA) Phase III (06/2024 to present)*
- *1915(c) CSED Waiver Development Project 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)*

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- *MHP and Behavioral Health Support (BHS) Project Phase III (06/2024 to present)*

- *Women, Infants, and Children Nutrition Program (WIC) Product Management Office (PMO) Phase III (11/2023 to present)*

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, 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) Support Project (10/2021 to 07/2022)
Emily served as a 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 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 PHE. This work included building upon existing vendor relationships with Optum and DXC to apply system modifications to accommodate necessary PHE actions.

– **New Jersey Department of Human Services (DHS)**

MMIS Modernization (07/2022 to 12/2023)
Emily served as the engagement manager for the PMO in collaboration with the ITO. The MMIS Modernization was the opportunity for DHS, 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, APD support, MITA support, and change control.

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

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 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**

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Henrico Area Mental Health and Development Services (HAMHDS) 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.0, ICD-10, MITA, and Transformed Medicaid Statistical Information System (TMSIS)

- Participating in CMS Pilot Certification gate level reviews with CMS representatives, including presenting system evidence to meet MITA 3.0 requirements

- Participating in the development and review of the MMIS RFP

- Participating in the development and updates of various APDs, as well as seeing these documents through to approved status with CMS

- Oversight and management of the Adult Medicaid Quality Grant

- Management of and participation in an MMIS implementation from RFP development through implementation, as well as post-implementation monitoring and defect resolution

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.

– MMIS (01/2007 to 10/2013)
Emily served as the manager of operations with the MMIS 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 LTC and hospice services.

– Office of Behavioral and Alternative Health Care (01/2005 to 12/2006)
Emily served as program manager of the State Medicaid LTC Program with overall duties involving the development, implementation, and supervision of the following programs: nursing facilities, hospice, hospice in nursing facilities, home health, 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 and human resource specialist in the State Medicaid LTC 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

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provider network regarding reimbursement issues related to the 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 LTC 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 LTC 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 Continuous Analgesia Device (CAD) 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.

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Annie Messinger, PMP®, LSSGB, Prosci® CCP

MANAGER

Berry, Dunn, McNeil & Parker, LLC

Annie Messinger is a skilled project manager and advisor, working with various child welfare and youth services projects and stakeholders. Annie also has more than 15 years of executive project management experience with youth service organizations focusing on serving community children and youth, especially from disadvantaged circumstances.

EDUCATION AND CERTIFICATIONS

BA, University of Southern Maine

Prosci® Certified Change Practitioner

Certified Project Management Professional® (PMP®)

Lean Six Sigma Green Belt (LSSBG)

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

6 years

KEY QUALIFICATIONS

- Six years' experience in child welfare project management with the WV DoHS, including strategic planning, budget forecasting, gap analysis, continuum of care service implementation, OCM, risk management, monthly reporting, business process improvement, and organizational effectiveness in lessons learned

- More than 15 years leading and advising various stakeholder groups from youth service organizations and agencies as a change ambassador and resource development professional

- More than a decade serving Boys & Girls Clubs in Portland, Maine, leading resource development, marketing, and brand protection while working with board of directors and cultivating hundreds of volunteers and donors for fundraising events and campaigns

- More than 15 years collaborating with federal agencies, most recently with the DOJ

PROJECT EXPERIENCE

BerryDunn (10/2018 to present)

– **Massachusetts Department of Revenue (DOR), Child Support Services Division (CSS)**

Strategic Planning Services for CSS' Outreach Program (03/2025 to 04/2026)

Annie is Project Manager and oversees the project deliverables in Year 1 of CSS' five-year outreach plan. The project deliverables

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include a marketing plan with an outreach reporting and monitoring plan, branding development, and marketing collateral with an online repository of outreach materials. Deliverables also include an engagement plan to help build trust for the agency, a case management model to support the existing work of CSS staff with families, and staffing and training plans for CSS' appointed outreach staff.

- West Virginia Bureau for Social Services (BSS)

Child Welfare Initiatives Project (05/2019 to present)

Annie is a strategic project lead in assisting WV with implementing its memorandum of understanding (MOU) with the DOJ, now entering the sixth year focusing on continuous quality improvement. Annie provides project management and support services to BBH, BMS and BSS within DoHS to implement its five-year plan to improve the continuum of care for children and families, pursuant to DoHS's agreement with the DOJ. Annie's project management experience supports all three bureaus in timely completion of critical tasks to help ensure DoHS remains compliant to the DOJ agreement and redesigns its child welfare system in a sustainable way.

– Montana Department of Public Health and Human Services (DPHHS), Child and Family Services Division (CFSD)

Business Process Mapping for CCWIS Procurement (05/2024 to 04/2025)

Annie is project manager of producing useful tools as Montana prepares for a CCWIS implementation. Annie facilitated discovery sessions and created current-state process maps, and worked with Montana's project leads and BerryDunn's marketing team to devise three journey maps depicting Montana's older youth in foster care, tribal partners, and foster and kinship parents/guardians, to help Montana present its CCWIS project's mission, vision, and goals to external stakeholders. Annie led an assessment of Montana's system training, agency-wide communication, and OCM structure, along with a gap analysis of current processes to help inform Montana's CCWIS planning and future implementation.

– Kentucky Department of Aging and Independent Living (DAIL)

Statewide Needs Assessment and State Plan (01/2024 to 09/2024)

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

– North Dakota Department of Health and Human Services (DHHS), Developmental Disabilities Services

Workforce Development Needs Assessment (08/2023 to 01/2024)

Annie was project manager and utilized her PMP® skills for leading the development of an assessment of the State's home- and community-based services (HCBS) workforce training systems. Annie was a servant leader of a team of SMEs that was key to assessing the workforce training. She upheld the project scope and schedule, organized and facilitated stakeholder listening sessions, and prioritized the client relationship and communication that culminated with an extensive assessment for DHHS' workforce and training systems.

– West Virginia Department of Human Services (DoHS)

Safe at Home West Virginia (SAH) Program Redesign (10/2019 to 10/2022)

Annie's experience with project management supported DoHS' BSS fiscal redesign of the SAH wraparound program for children and families, as the federal funding waiver ended October 1,

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2019, pursuant to the federal Family First Prevention Services Act (FFPSA). Annie managed and facilitated several stakeholder workgroups and helped update and maintain State documents for BSS to remain transparent with significant programmatic revisions. Annie's assistance with State documentation updates helped the State successfully reorganize SAH, including areas such as eligibility, enrollment, and data systems, from a $30M to a $13M program, and helped ensure all 10 signed provider contracts were received by the deadline. Annie helped the State monitor and assessed the program on an ongoing basis.

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

Annie assisted with project management activities that supporting the development and review of the State's assessment and gap analysis outlining the child welfare systems impacted by the FFPSA. Additionally, Annie provided her experience with project management to support the State's implementation of the FFPSA.

– West Virginia Bureau for Medical Services (BMS)

Payment Error Rate Measurement (PERM) Project (10/2018 to 10/2019)

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

– West Virginia Bureau for Public Health (BPH)

Accreditation Readiness Support (12/2018 to 06/2019)

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

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

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

Wayfinder Schools (03/2017 to 01/2018)

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

Boys & Girls Clubs of Southern Maine (09/2006 to 03/2017)

– Director of Development and Marketing (05/2012 to 03/2017)

Annie executed $3 million capacity campaign to augment five-year budget forecast, with dynamic campaign committee and more than 140 donors over three years. She supervised and reviewed

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development coordinator, part-time grants coordinator and administrative assistant. She worked daily with 38 board trustees of all personalities, industries, and work styles to accomplish mission and strategic goals. She managed six annual fundraising events including a historical spring auction that grossed over six figures, and two in partnership with large community partner. She worked with the following trustee-led committees: executive, capacity campaign, steering, strategic planning, resource development, investments, finance, marketing, human resources, program, state alliance and seasonal events. She collaborated with board and adjunct committee members on five-year strategic plan, and implemented and actively worked to execute the strategic plan. She implemented quarterly scoreboard measurements of marketing initiatives, ranging from event guests and volunteers to long-term donors. She was responsible for fundraising database management and reporting, requiring extensive manipulation of information from Raiser's Edge software. She cultivated, secured, and stewarded major gifts, collaborated with planned giving advisors and donors to grow $10 million endowment, and institutionalized annual resource development goals.

– Development Director (09/2006 to 05/2012)

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

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EDUCATION AND CERTIFICATIONS

MS, Economics, Oklahoma State University

BS, Business Administration – Economics (Quantitative Statistics Studies), Oklahoma State University

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

6 Years

Arisara Miller, MS

SENIOR ECONOMIST/MANAGER
Berry, Dunn, McNeil & Parker, LLC

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

KEY QUALIFICATIONS

- Over 21 years of Medicaid experience, including six years working directly with state Medicaid agencies
- Over 20 years of experience with claim and encounter data
- Leads data visualization projects using Tableau and PowerBI
- Conducts analyses for trend reporting, pricing/actuarial support, contract negotiations (provider/accountable care organizations/ vendors), and financial reconciliations/settlements
- Experience with care management program design and registry creation to track high-risk, high-cost, or chronically ill patients
- Skill in program evaluations and healthcare quality measures

PROJECT EXPERIENCE

BerryDunn (06/2018 to present)

Arisara is a manager in BerryDunn's Health Analytics Practice, specializing in healthcare data analytics. She conducts quantitative research on market impacts from health system mergers, policy changes, and insurance mandates. Arisara builds SAS processes to clean, validate, and analyze claims and enrollment data, as well as generate reports on financial performance and healthcare quality. She creates analytic datasets from diverse sources, including All-Payer Claims Databases (APCD), and develops data visualizations to enable data-driven decision-making.

– **New Hampshire Insurance Department (NHID)**
Health Cost Transparency Initiative (07/2023 to present)
Arisara supports the Health Cost Transparency initiative by creating interactive Tableau dashboards and providing peer code reviews to help analysts develop and refresh analytic datasets for the Health Cost online reference tool, which allows users to compare the estimated cost of outpatient healthcare services in and around New Hampshire by insurance plan.

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

Child Welfare Initiatives Project Management Services (09/2018 to present)

Arisara is a key contributor and SME responsible for producing monthly, quarterly, and semi-annual report packages to meet the reporting needs of the DoHS OQA. She also plays a central role in report prototyping and addressing ad hoc reporting requests to support OQA's operational needs. As the lead visualization designer and creator for the DoHS child welfare system initiatives, Arisara develops interactive dashboards and flexible on-demand reporting tools.

- **Massachusetts Center for Health Information and Analysis**

Mandated Benefit Reviews (MBRs) (07/2018 to present)

Arisara works on MBRs, including both individual prospective mandates and retrospective thorough reviews of all mandates. For these MBRs, she researches the best methods to identify relevant populations and healthcare services, writes SAS programs to query the Massachusetts APCD, validates the outputs, and supports the actuarial team in building health insurance cost and utilization models. Arisara also co-leads project management for the current round of the review, which occurs every four years.

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

Data Improvement Project (08/2020 to 10/2023)

Arisara delivered analytical and data profiling support, helping the state identify and address data quality and usability challenges within its Medicaid program.

- **Beacon Health**

Analyst (06/2018 to 08/2021)

Arisara supported data warehouse management and reporting for Beacon Health, the population health organization for Maine's Northern Light Health, across multiple programs, including the Center for Medicare & Medicaid Services (CMS) Medicare Shared Savings Program (MSSP), Anthem's Commercial Accountable Care Organization (ACO), MaineCare's Medicaid program, and Beacon Health's health plan, Beacon Direct.

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

- **Medical Informaticist - Medical Management Analytics (05/2017 to 05/2018)**

Arisara designed and continually improved Tableau dashboards to track cost of healthcare savings from initiatives such as ClaimXten clinical editing, spine surgery/pain management, and radiology pre-service authorization programs. She performed medical and payment policy analyses to inform the Medical Policy Impact Committee, enable new decisions, and evaluate ongoing practices. Arisara also documented business requirements and designing data models to store post-service clinical review records in the new enterprise data warehouse infrastructure. Most importantly, Arisara served as the team's Tableau Ambassador to establish and encourage best practice standards for server publishing, efficiency, and data visualization.

- **Medical Informaticist - Medical Operations Analytics (11/2011 to 01/2014)**

Arisara built and enhanced analysis methods, data systems, and web-based reporting tools. As a medical informaticist, she critically reviewed existing processes to identify inefficiencies and potential problems, took actions to explore and implement solutions, and directly supported the Chief Health Officer, Vice Presidents, and directors to achieve corporate goals. She set up an automated interface to deliver daily data feeds from internal data marts to the case management system vendor to enhance member-level case management, and established and maintained a robust model to calculate savings from pre-service review activities and medical policies, which revealed significant cost reduction opportunities.

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

‒ **Medical Economics Principal (01/2014 to 05/2017)**

Arisara led the development of numerous complex and time-sensitive analyses to support the Chief Financial Officer (CFO), Chief Actuary, and Vice Presidents. She analyzed data to support Medicaid payment method re-pricing, primary care physician attribution, and ACO contract strategy. Other tasks included fulfilling state reporting requirements for total medical expense and relative pricing, developing the quarterly medical expense dashboard, collaborating with IT to help ensure data integrity and resolve issues, and guiding junior and senior analysts on SAS/SQL coding, enterprise reporting definitions, and best practices.

‒ **Senior Medical Economics Analyst (07/2007 to 11/2011)**

Arisara tracked medical care expenses and utilization trends to inform senior management and influence key decisions on budgeting and pricing projections. She created reporting packages to satisfy the needs of internal and external customers, conducted research with medical directors to build methodologies for identifying at-risk patients for telephonic outreach programs as mandated by state authority and corporate goals, prepared and presented ad hoc analyses to support key corporate initiatives to improve care quality and reduce cost, and coordinated with IT to validate data quality and make recommendations on process and system improvements. Arisara was also responsible for writing project plans, business requirements, technical specifications, and analytic definitions, and for coaching staff on healthcare data, data warehouse structures, and the analytic tool being used.

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

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

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

‒ **Finance Development Program for Audit and Controls (01/2004 to 06/2004)**

Arisara completed operational and IT readiness assessments of new product development initiatives. She performed ad hoc data extractions and analyses to support internal and external audit services, and assisted the legal department to help ensure that appropriate confidentiality agreements are in place before releasing any HIPAA-protected health information to external parties.

‒ **Analyst (05/2002 to 01/2004)**

Arisara evaluated the financial and clinical effectiveness of cardiac and diabetes disease management programs. She oversaw data compilations and rate calculations for several National Committee for Quality Assurance (NCQA) HEDIS measures, co-wrote annual population-based analysis publications to present the top 20 medical conditions affecting insured populations, and studied and compiled claim and medical chart review data to secure the annual supplemental Medicare + Choice payments for the heart failure patient population.

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

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

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Dina Nash, MPH

MANAGER
Berry, Dunn, McNeil & Parker, LLC

Dina Nash is a manager with BerryDunn's Health Analytics Practice Group (HAPG) who specializes in policy analysis, as well as healthcare data analysis using claims and clinical data. She has worked extensively with SAS, Excel, and Tableau to derive analytic insights that inform and drive decision-making. Her interests and experience also extend to engagement and diversity and inclusion initiatives. Dina is a member of BerryDunn's Diversity, Equity, Inclusion, Belonging, and Access (DEIBA) Advisory Council.

EDUCATION AND CERTIFICATIONS

MPH, Epidemiology and Biostatistics, Boston University School of Public Health

BA, Psychology, Harvard University

PROPOSED PROJECT ROLE

General Project Manager

RELEVANT EXPERIENCE

7.5 years

KEY QUALIFICATIONS

- Over seven years' experience in healthcare data analysis and data visualization

- Experienced in SAS, Excel, and Tableau

PROJECT EXPERIENCE

BerryDunn (09/2021 to present)

Dina serves as a health policy and analytics manager, working with clients on data analysis, claims analysis, and clinical data projects. Dina also works on MBRs (estimating the financial impact of pending mandated benefit legislation), and health policy and regulatory analyses. She writes SAS code to create analytic datasets using a variety of data sources, including APCD, and assists with conducting statutory review and medical efficacy research. Dina develops data visualizations that inform, and drive decision-making, and collaborates on population health analyses of utilization and outcomes.

– **New Hampshire Insurance Department (NHID)**
Health Cost Transparency Initiative (07/2023 to present)
Dina supports the Health Cost transparency initiative with the creation of interactive Tableau dashboards. She also supports project management, helping to ensure smooth coordination with the client and associated vendors.

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— **West Virginia Department of Human Services (DoHS)**
Mental Health Parity Compliance Analysis (01/2022 to present)
Dina provides essential support for writing and research in mental health parity reports for West Virginia Medicaid Managed Care and WVCHIP. She has also developed interactive and informative dashboards for Medicaid Managed Care and WVCHIP leadership, along with trend charts, to visually present complex data from Medicaid MCOs and BMS Pharmacy related to mental health parity.

Child Welfare Initiatives Project Management Services (09/2021 to present)
Dina supports the project management of a team of analysts working with Medicaid state agencies, including the DoHS OQA, BMS, BBH, Bureau for Family Assistance (BFA), BSS, and DoHS vendors. She consistently organizes core team efforts and maintains regular communication with OQA, BMS, BFA, BSS, and DoHS vendors, helping to ensure alignment with reporting and CQI program needs. Dina's responsibilities include generating visualizations for monthly, quarterly, semi-annual, prototype, and ad hoc/stop-gap reports to meet OQA's operational requirements. She also regularly reviews team members' work and verifies consistency and accuracy. Dina is also involved in prototyping new actionable and insightful visuals to enhance the clarity and effectiveness of the team's deliverables.

— **Massachusetts Center for Health Information and Analysis**
Mandated Benefit Reviews (MBRs) (09/2021 to present)
Dina works on MBRs, for which she writes SAS code to query the Massachusetts APCD, creates diagrams and visuals, and supports medical efficacy research and writing of the report. More recently she led the Biomarker Testing MBR. MBRs include a medical efficacy analysis and an estimate on health insurance costs, typically over five years. MBRs Dina has worked on include:

- An Act to Increase Access to Nurse-Midwifery Services (H1069/S607): July 2024

- An Act Improving Access to Breast Pumps (H967/S600): July 2024

- An Act Relative to Patient Access to (Cancer) Biomarker Testing (H1074/S689): April 2024

- An Act Relative to LGBTQ Family Building (S622): August 2023

- An Act Relative to Applied Behavioral Analysis Therapy (H1084/S617): August 2023

- A Relative to Newborn Screenings for Congenital Cyomegalovirus (H2338/S1471): March 2023

- An Act Providing Access to Full Spectrum Addiction Treatment Services (H2116/S1292): March 2023

- An Act Relative to Human Donor Milk Coverage (H1106/S717): November 2022

- An Act Relative to Breast Cancer Equity and Early Detection (H4748/S2856): November 2022

- An Act Relative to Dual Diagnosis Treatment Coverage (H1147/S685): July 2022

- An Act to Update Mental Health Parity (H2065): July 2022

- An Act Relative to Collaborative Care (S769): March 2022

— **Wisconsin Office of the Commissioner of Insurance**
Wisconsin Individual Health Insurance Market Analysis, Short-Term Limited Duration Plans, and Network Adequacy Reports (03/2022 to 10/2023)
Dina played a crucial role in supporting research, writing, and data analysis for the Wisconsin Individual Health Insurance Market Analysis, Short-Term Limited Duration Plans, and Network Adequacy reports. Her contributions encompassed conducting in-depth research, synthesizing complex data, and crafting insightful analyses. Dina's expertise extended to developing visually engaging and informative visualizations to facilitate understanding and decision-making in these

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critical areas of health insurance evaluation.

Mass General Brigham Enterprise Analytics (06/2018 to 09/2021)

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

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

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

Center for Population Health (06/2017 to 08/2017)

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

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Ashley Pannell, EMBA, MS

SENIOR CONSULTANT
Berry, Dunn, McNeil & Parker, LLC

Ashley Pannell is a skilled SME and human service professional with 15+ years of experience in managing healthcare programs, specializing in state waivers, eligibility, case management, managed care, policy, gap analysis, and program development at local and state levels. She is a strategic advisor with the proven ability to analyze data, identify risks, execute compliance requirements, and expand Medicaid services.

EDUCATION AND CERTIFICATIONS

Executive MBA, Specializations: Business Communications, Advance Finance, Strategic Thinking, Quantic School of Business and Technology

MS, Psychology, Applied Behavioral Analysis, Purdue University

BFA, Theater and History Education, Shenandoah University

Product Management, Aha!

Business Analyst, Microsoft

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

9 years

KEY QUALIFICATIONS

- Over 15 years in management of healthcare programs, specializing in state waivers, eligibility, case management, and policy development at local and state levels
- Conducted over 700 hours of training on healthcare regulations and operations for various state/local agencies and providers
- Skilled in analyzing data to identify gaps, trends, risks, and service utilization to enhance compliance
- Effective communicator and can engage stakeholders through training and collaboration

PROJECT EXPERIENCE

BerryDunn (04/2024 to present)
Ashley is a senior consultant with BerryDunn's MPG, lending her extensive knowledge base within the Medicaid and health and human services realm to support the WV CSED Waiver Project.

– **West Virginia Bureau for Medical Services (BMS)**
Justice Involved Program Support Project (07/2024 to present)
Ashley provides program support that assists BMS with the increasing needs for policy integration related to members who are being released from carceral settings. In this role, Ashley analyzes program eligibility, efficiency, and health outcomes, and develops strategies for process improvement.

1915(c) CSED Waiver Development Project (05/2024 to present)
Ashley provides subject matter expertise as the project manager on the planning, design, and implementation of a Medicaid HCBS waiver program.

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The CSED Waiver provides an array of community-based services that support children and young adults who would otherwise require institutionalization to remain in their homes and communities. In this role, Ashley has developed policy and training tools for provider development and gives input and guidance on best practices. She also facilitates communication and collaboration between the MCO, administrative service organizations, and providers, while monitoring performance measures, tracking key indicators, and managing data reporting.

– **West Virginia Bureau for Social Services (BSS)**
Child Welfare Initiatives Project (05/2024 to present)
As a SME, Ashley provides detailed analysis of funding mechanisms available to youth, develops policy for Medicaid providers, and contributes to stakeholder engagement efforts, focusing on residential and community-based supports to help ensure service delivery quality and compliance with regulations, including the DOJ Settlement Agreement.

Commonwealth of Virginia (VA) (12/2016 to 04/2024)
As a service authorization consultant, Ashley worked with the Virginia Department of Medical Assistance Services (DMAS), which is the Single State Medicaid Agency for the Commonwealth of Virginia, and the Department of Behavioral Health and Developmental Services (DBHDS). DBHDS and DMAS work directly together to manage and implement Virginia's Medicaid programs. DMAS is primarily responsible for the financing and overall administration of Medicaid services, including policy development and regulatory oversight.

In this role, Ashley helped ensure that DBHDS waivers' service authorization system met all performance metrics within 10 business days, delivered high-quality service to users, and optimized the allocation of finances to members receiving Medicaid-funded services in Virginia. Ashley consulted with 1,300 providers, stakeholders, and all 41 community services boards, helping to ensure compliance with VA Medicaid and Centers for Medicare & Medicaid Services (CMS) requirements using the VA MMIS. Additionally, she served as a SME on waiver and HCBS services for Medicaid within DBHDS, using analytical data from the Virginia Waiver Management System, DMAS, and CMS regulations.

Highlights of Ashley's work with DMAS included:

- Working directly with DMAS on eligibility, enrollment, provider claims, and customized rate analysis, engaging in technical deep dives to help ensure accurate and efficient processing and policy interpretation.

- Working directly with DMAS in creating policy and guidance tools for stakeholders regarding service provision of Medicaid waiver services, in adherence to the DOJ Settlement Agreement and HBCS.

- Working directly with DMAS on the Supports Intensity Scale (SIS) project with the Human Services Research Institute to reform the SIS assessment tool, which includes analyzing data on service utilization and costs to improve resource allocation and tier structures.

- Working directly with DMAS, conducting compliance reviews of HCBS providers via documentation and on-site visits, and advising and collaborating with senior leadership on statewide policy development, implementation, and monitoring.

Guillory Health (07/2015 to 01/2017)
As a program administrator, Ashley improved program operations efficiency by 31% in seven months, using data analytics and market trends; responded to statewide healthcare reform and initiative by driving cost savings of 15% through quantitative analysis; and developed and implemented new strategic initiatives resulting in 40% revenue increase in nine months. She

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consulted on program design and expansion by managing client expectations through qualitative analysis; provided technical guidance as a strategic problem solver for five healthcare programs through subject matter expertise; successfully increased staffing by 30% in six months through utilization of electronic visit verification and employee incentive program; streamlined healthcare reform compliance processes, resulting in 35% increase in operational efficiency and 30% lower administrative costs; and developed training for staff and management team on Medicaid waiver and CMS requirements.

Fairfax County Government (05/2011 to 05/2015)

As a support coordinator, Ashley improved program operations and compliance for large state healthcare agencies in three months, resulting in 35% expansion in services; led multiple interdisciplinary teams by consulting, coordinating, implementing, and monitoring delivery of timely and satisfactory services to clients; and collaborated in the development of innovative HCBS and behavioral health payment system design for state Medicaid agencies, resulting in improved reimbursement in 55 weeks and increased stakeholder satisfaction. She developed and reviewed strategic plans monthly and quarterly, provided crisis intervention, and determined Medicaid eligibility for 100+ clients; managed multiple teams to identify and mitigate projects risks around scope, schedule, and quality, resulting in successful completion of deliverables within timeline and budget goals in 24 months; and led the implementation of healthcare reform initiatives across 10 counties in Virginia and six different states, resulting in a 35% efficiency improvement in six months.

ServiceSource, Inc. (03/2011 to 05/2011)

Ashley was a program manager, who increased state healthcare reimbursement approval rate by 40% in two months via HCBS/behavioral health expertise; managed professionals providing Medicaid and HCBS services to over 200+ people ensuring that short-term and long-term outcomes were achieved; increased Medicaid behavioral health services access by 15% in two months by partnering with community businesses and stakeholders to develop and implement creative solutions; and identified areas for improvement, prioritization, and quality by conducting data-driven reviews of utilization and research analysis.

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Andrea Richardson, Prosci® CCP, LSSGB

MANAGER
Berry, Dunn, McNeil & Parker, LLC

Andrea Richardson is human services professional with experience in system integration and design, organizational tool and training design for large human services agencies, and technology development. She has experience facilitating meetings, engaging agency and community stakeholders, data-based decision making to support organizational and outcome change, federal and state report writing based on assessment results and findings, developing and implementing business strategy, organizational effectiveness assessment, and strategic planning.

EDUCATION AND CERTIFICATIONS

BS, Family Studies, University of Connecticut

Prosci® Certified Change Practitioner

Lean Six Sigma Green Belt (LSSGB)

Certified Project Management Professional® (PMP®), *In Progress*

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

7 Years

KEY QUALIFICATIONS

- 30 years of experience working with human services programs and systems, including strong experience with developmental disabilities and human services IT system integration and design
- Human Services Practice co-lead and Fresh Perspectives in Social Work podcast

PROJECT EXPERIENCE

BerryDunn (05/2022 to present)

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

Child Welfare Initiatives Project (07/2022 to present)

Andrea provides project support services to assist DoHS with implementing its five-year plan to improve the continuum of care for children and families, pursuant to DoHS' agreement with the DOJ. Andrea supports the Crisis Mobile Response System (CMCRS) initiative, providing guidance to help ensure the group meets the objectives as outlined in the DOJ agreement, and pursuant to recommendations presented by the project's independent SME.

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Communication System Implementation (02/2025 to present)

Andrea is serving as the project manager and child welfare SME to support the implementation of a communication system that will aid BSS caseworkers and interested parties to support the children and families involved in the child welfare system. Andrea manages the selected vendor implementation process and coordinates with key State interested parties to successfully implement the phases of the system work outlined in WV House Bill 4975 (HB4975).

RFP Development (06/2024 to present)

Andrea served as a child welfare SME to support the development of an RFP to procure a communication system to aid BSS caseworkers and interested parties who support children and families involved in the child welfare system. As a SME, leads the development of system requirements, supported the RFP development, and collaborated with DoHS and BSS leadership as they developed a vision for the system that meets the requirements of WV HB4975.

Improvement of the Children's Crisis and Referral Line (CCRL) and Children's Mobile Crisis Referral and Stabilization (CMCRS) (05/2022 to present)

As a consultant, Andrea serves as a child welfare and crisis services SME to support WV by improving the use of the CCRL and CMCRS services statewide. Andrea works with the State to identify gap areas and find solutions to make more informed decisions as they expand and improve their implementation efforts in working with providers and the community.

Foster Care Reduction Project Design (09/2022 to 12/2022)

Andrea served as a senior child welfare consultant to assist BSS with designing a prospective solution that would help transform the way the agency engages children, youth, and families to build community support for more prevention services and reframe how the agency team views the use of foster care and congregate care use. The plan was used as a driver for system change and complimented national resources provided through Casey Family Programs.

- **Iowa Department of Health and Human Services (IA HHS)**

Child Care System Procurement (01/2025 to present)

Andrea is serving as the engagement manager on this project facilitating department leadership and program-level discussions to outline the system needs. Andrea manages the development of the RFI and the gathering of requirements, and supports the procurement process to secure a new childcare system for IA HHS. She manages the budget, creation, and delivery of project deliverables, resource allocation, and client expectations.

CCWIS Procurement (01/2025 to present)

Andrea is serving as the engagement manager and SME on this project facilitating department leadership discussions regarding the needs of the department and meeting the federal CCWIS requirements. Andrea uses her professional knowledge to collect requirements and create an RFI for the procurement of a new system to support child welfare work. She manages the budget, creation, and delivery of project deliverables, resource allocation, and client expectations.

SNAP/FIP/RCA System Procurement (10/2024 to present)

Andrea is serving as project manager and SME on this project to guide and support the development of an RFP for the procurement of a solution for IA HHS' SNAP/FIP services. Andrea manages the scope and budget of the project, maintains consistent communication with IA HHS teams, and manages risks and decisions as the project proceeds. She manages the creation and

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delivery of project deliverables, resource allocation, and client expectations.

- **Kentucky Department of Community-Based Services, APS**

Comprehensive Statewide Needs Assessment Project Management (12/2024 to present)

Andrea is serving as an engagement manager on this project facilitating department leadership discussions, engaging state and interested parties through listening sessions and community forums, performing research, and managing the development of the needs assessment and state plan for APS. She manages the budget, creation, and delivery of project deliverables, resource allocation, and client expectations.

- **Minnesota Department of Children Youth and Families (MN DCYF)**

Children and Family IT Modernization (11/2024 to present)

Andrea is serving as a SME on this project reviewing and interpreting documentation from a people, process, and technology point of view. She works with MN DCYF and DHS to capture the vision of the departments and engage interested parties to help ensure it meets state, county and resident needs. Andrea supports the creation of a needs assessment, strategic plan, and implementation roadmap that outlines the next steps for the department.

- **Guam Department of Public Health and Social Services (DPHSS)**

Enterprise Program Management Office (EPMO) Eligibility and Enrollment (E&E) Transformation Project (10/2024 to 02/2025)

Andrea worked as the engagement manager on this project participating in leadership discussions as DPHSS considered the next step in their system transformation for their E&E program. She managed the quality of the deliverables and status updates and provided subject matter expertise to this project.

- **Wake County, NC Health and Human Services (HHS)**

Strategic Planning (04/2023 to 02/2025)

Andrea served as human services and child welfare SME for the BerryDunn team that assisted HHS with developing and implementing a strategic plan for Wake County HHS to help deliver and drive a full-service operations infrastructure to address the County's Social Determinants of Health needs for individuals and their families using a Human Services Value Curve framework.

- **Montana Department of Public Health and Human Services (DPHHS), Child and Family Services Division (CFSD)**

Business Process Mapping for CCWIS Procurement (05/2024 to 12/2024)

Andrea served as engagement manager on this project facilitating DPHHS leadership discussions, engaging state and interested parties, performing research, providing CCWIS expertise, and leading the development of business process maps for the State's procurement of a new child welfare case management system. She provided guidance to CFSD leadership on the necessary steps for a successful federal review and procurement process. Andrea managed the project deliverables, budget, resource allocation, client expectations, and project tasks.

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

Statewide Needs Assessment and State Plan (01/2024 to 05/2024)

Andrea served as engagement manager on this project, facilitating department leadership discussions, engaging state, community, and interested parties, performing research, analyzing assessment results, and making recommendations that can be used to support the development of a State Plan on Aging. Andrea was a lead facilitator for the development of the State Plan on

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Aging, working with department leaders in identifying their vision and goals for the future of aging and independent living services in the Commonwealth of Kentucky. As the engagement manager, Andrea managed the project deliverables and budget, resource allocation, client expectations, and project risks.

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

Workforce Development Needs Assessment (08/2023 to 02/2024)

Andrea served as engagement manager on this project to assess the training needs of the Developmental Disabilities Section through discover sessions with interested parties, performing research, making recommendations, and developing needs assessment findings that could be used by DHHS in their system improvement efforts. As an engagement manager, Andrea managed the project deliverables and budget, resource allocation, and client expectations.

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

Consulting Services for a Needs Assessment for Afghan Refugee School Impact (RSI) (03/2023 to 02/2024)

Andrea served as engagement manager on this project, engaging interested parties, performing research, making recommendations, and developing a needs assessment that focused on improving the academic performance and successful integration of eligible Afghan refugee children and youth through facilitating education access in public schools.

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

Office of Children's Services (OCS) CCWIS Planning and Procurement (04/2022 to 02/2024)

Andrea served as project manager and senior business analyst on this project, which included performing a needs assessment to understand the strengths and challenges related to OCS' existing IT system and associated business processes and DHSS' vision and goals for the future, engaging with interested parties internal and external to OCS (including community partners, providers, and Tribal Nations), performing redesign of core business processes, making recommendations to help OCS achieve its vision and goals, performing an alternatives analysis and cost benefit analysis, and providing support to OCS with the procurement of the new CCWIS.

KEPRO (11/2021 to 05/2022)

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

ICPromise (03/2017 to 05/2022)

As the founder of ICPromise, Andrea developed and facilitated podcast discussions focused on leadership development for non-profit leaders. She designed and created a bimonthly newsletter, *The Smarter Non-Profiter*, which provided resources for non-profit leaders. She created no-going training and webinars to assist non-profit leaders in professional development skills that supported non-profit organization outcomes and growth.

INFO-MATRIX (03/2017 to 05/2022)

Andrea served as a human services consultant to do the pre-sales capture planning for Human Services and other vertical areas. She acted as liaison with county Children and Youth Agencies on case management system needs, policy clarifications, practice improvement, and customer

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relations. Andrea developed focus group opportunities to better understand county practice needs and designed high-level requirements that could influence practice proactively. Andrea attended statewide administrator meetings to discuss policy changes in child welfare and identify how they would affect the case management system locally and statewide.

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

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

Pennsylvania Department of Human Services (08/2006 to 10/2008)

Pennsylvania's Single State Medicaid Agency

Andrea served as the SOC project manager to monitor the specific deliverables established through the federal demonstration grant, ACF Improving Child Welfare Outcomes through SOC, emerging issues needing resolution in conjunction with the Office of Children Youth and Families (OCYF), Office of Mental Health and Substance Abuse Services (OMHSAS), DHS, and ACF. She analyzed and wrote federal semi-annual reports as required by ACF related to the SOC demonstration grant, managed the five-year $2 million fiscal plan, and supported OCYF and OMHSAS in all phases of the local and national evaluation including tool design, outcome, and measurement determination and analysis. Andrea worked with local county sites that were implementing specific pieces of the project to improve child welfare outcomes in the local area and coordinated with smaller county projects that were used to improve child welfare outcomes. Andrea met with state HHS agency partners weekly to coordinate, review, and improve the integration of services across the Commonwealth through the creation and implementation of the Integrated Children's Services Plan (ICSP). The ICSP involved the child service systems noted above. Andrea collaborated nationally with TA providers and peer state grantees to share lessons learned, present on grant findings, and strategize continued activities once the grant concluded.

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

Andrea served as a Behavioral Health and Recovery Services (BHRS) administrator in charge of Behavioral Health and Rehabilitation Services program for children in the Dauphin County Area. She supervised behavioral specialist consultants, mobile therapist, therapeutic support staff, and administrative staff. Andrea also designed and implemented clinical programs for people supported and monitored the quality of services within the licensing guidelines.

Minerva Educational Consultants (08/2001 to 08/2006)

As the president, educational advocate, behavioral analyst, and applied behavior analysis (ABA) therapist, Andrea provided QA tools and training for school programs and staff. She designed, implemented, and monitored behavior and skill development programs for children across the

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spectrum in school and home settings. She reviewed and interpreted evaluations from both schools and independent evaluators. She provided educational advocacy services for families with children with Individualized Educational Plans. She created resource blog for families with newly diagnosed children.

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

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

Canton Public Schools (2003)

As an autism specialist, Andrea provided training to staff on ABA techniques and behavioral interventions. She designed, implemented, and monitored program focused on supporting children diagnosed with Autism/Pervasive Developmental Disorder for school systems.

Family Autism Center (10/2001 to 04/2003)

As the director, Andrea designed and implemented programs to meet the needs of over 1000 professionals and families with children with an autism spectrum disorder. She managed non-profit budget of over $100,000 through fundraising and grant writing to meet the financial needs of the Center budget. She designed and implemented QA tools to monitor program effectiveness in accordance with state regulations. She designed resource manuals for pediatricians. She provided behavioral consultation, information referral, outreach, and training to families and communities in need. She worked with the Massachusetts Department of Mental Retardation and Department of Education to design appropriate service deliveries for children with an autism spectrum disorder. She also edited and designed Center Newsletter – FAC Facts.

Beacon Services, INC. (12/1997 to 10/2001)

As the supervising and lead educator, Andrea was responsible for designing and implementing ABA programs for children with autism spectrum disorders and their families. She provided supervision and training to educators and associates implementing ABA therapy in home and school settings. Andrea also served as a member of the research and training committee. She conducted standardized testing for children with autism spectrum disorders.

Walnut Street Center (08/1996 to 12/1997)

As a program coordinator for the Education and Training Department, Andrea was responsible for designing and implementing QA measures for behavioral and daily living skill programs. She interviewed, hired, trained, and supervised direct care and management teams. She designed and maintained departmental budgets within financial parameters of a non-profit organization.

The May Institute for Adult Services (12/1995 to 11/1997)

As an employment and training specialist and program coordinator for residential homes, Andrea was responsible for participating and evaluating programs as a member of the QA team. She taught behavioral management techniques and designed and implemented behavioral plans. She conducted, wrote, and evaluated program assessments to fit the needs of the individual service plan. She conducted staff meetings and supervisions. She participated in research committees and developed a journal library.

The Walker Home and School (01/1995 to 12/1995)

As a caseworker, Andrea was responsible for managing care for boys with emotional difficulties by providing behavioral modification, coping skills, and support. She determined personal goals and

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wrote reports in accordance with Individualized Education Plans. She also worked privately with a special needs family.

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Michelle Weaver

CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

EDUCATION AND CERTIFICATIONS

BS, Chemical Engineering, Virginia Polytechnic Institute and State University

Achieve Global – Leadership for Results Trainer Certification

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

26 years

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

PROJECT EXPERIENCE

BerryDunn (04/2021 to present)

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

Child Welfare Initiatives Project Management Services (04/2021 to present)

As a SME, Michelle supports BMS, BBH, and BSS in establishing its QA/PI programs, systems, and infrastructure. These include the development and implementation of DoHS's CQI plan, KPIs, data collection and reporting, recurring quality committee reviews, and rapid cycle improvement activities. Additionally, Michelle meets regularly with all three bureaus to assist in the establishment of systems for aggregating data for completion of cross-systems analysis to evaluate accessibility, availability, and outcomes of services for children and families in the children's mental health services system. Michelle participates in regular review of policy and process changes with all three bureaus to help ensure integration of data, reporting, and quality processes.

Opt2Inspire LLC (08/2019 to present)

As managing director, Michelle provides consultation and project management services to business and state agencies in the ID/DD and child welfare services sector.

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

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

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

- **Chief Operating Officer (COO) (04/2014 to 05/2019)**

As COO, Michelle provided oversight for day-to-day operations of six subsidiary operating companies providing supported living, residential habilitation, licensed homes, employment services, day treatment, and behavioral and therapeutic supports in several states. In this role, she managed $160 million in annual revenue, with approximately 3,400 employees. Additionally, she oversaw program operations; managed development of new services and integration of acquisitions; and maintained relationships with state human service and Medicaid agencies, counties, and other customers and community partners, including negotiation of reimbursement rates and regulatory changes.

- **Chief Development Officer (08/2012 to 04/2014)**

As Chief Development Officer, Michelle developed proposals and project plans in response to Requests for Proposals/Qualifications; provided support to operations teams in startup and other organic growth efforts; and oversaw mergers and acquisitions.

- **Vice President of Developmental Disabilities Agency Operations (09/2006 to 08/2012)**

In this role, Michelle oversaw and directed division operations providing developmental therapy and behavior intervention services to children and adults with disabilities in multiple locations across Idaho and Washington. She developed and maintained policies and procedures to help ensure compliance with state and federal regulations, as well as alignment with organizational objectives. Additionally, she ensured division-wide communication and training on policy and regulatory changes and updates; oversaw and assisted with preparation for internal and external quality assurance, licensing, and certification audits; and participated in the state-wide provider association, including serving a two-year term as president.

- **Vice President (VP) of Business Systems (02/2005 to 09/2006)**

As VP of Business Systems, Michelle served as project manager for an initiative to standardize multi-state operations throughout the assisted living division and developmental disabilities program division. Additionally, she facilitated development and implementation of the Tailored Life® Process for operations, defining the systems, policies and procedures, processes, and training for providing personalized senior resident care and services for individuals with disabilities. In this role, Michelle also facilitated implementation of case management software across five senior living communities in two states.

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

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

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

As branch manager, Michelle provided oversight of residential habilitation services in 10

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community-based homes for adults with developmental disabilities.

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

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

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

MANAGER
Berry, Dunn, McNeil & Parker, LLC

Dawn Webb is a manager in BerryDunn's Medicaid Practice Group (MPG), providing leadership and project management to 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 APDs. Dawn's 15 years of project management experience, coupled with her certifications as a CPC, COC, and a Prosci® Certified Change Practitioner, provides a unique perspective to clients across the Medicaid enterprise.

EDUCATION AND CERTIFICATIONS

BS, Healthcare Leadership, Wheeling Jesuit University

AAS, Office Administration, WVU at Parkersburg

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

General Project Manager

MEDICAID EXPERIENCE

21 years

KEY QUALIFICATIONS

- 30 years of experience in 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 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

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PROJECT EXPERIENCE

BerryDunn (08/2017 to present)

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

Medicaid Claims Audits (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 and 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 Project (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 Assistance (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 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 TPL Procurement projects. Dawn also provides support to other engagement projects, including:

- IT Control Environment Review (07/2024 to present)
- CCBHCs State Plan Amendment (06/2024 to present)
- System Development Life Cycle (SDLC) Coordination Project (06/2024 to present)
- Medicaid and WVCHIP Enterprise System (MCES) Procurement Assistance Project (04/2024 to present)
- MES Modernization Strategy and Procurement (MSP) Project (07/2021 to present)
- State Plan Review and Support (SPRS) Project (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)
- PHE Support Project (12/2021 to 12/2024)
- Data Improvement Project (09/2019 to 06/2024)
- Provider Management Support Project (11/2019 to 10/2023)

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- Third-Party Liability (TPL) Options Analysis and Procurement Assistance Project (05/2019 to 03/2022)

- 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 SME before beginning her tenure as project manager. She collaborated closely with the client to evaluate the MMIS fee schedules and claim edits to help ensure MMIS setup followed Medicaid policy and to provide analysis of cost savings opportunities for BMS.

– **Colorado Office of State Auditor (OSA)**
Medicaid Recovery Audit Contractor (RAC) Program Evaluation (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 BerryDunn's Government Assurance Practice Group 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) Department of Human Services**
Enterprise Portfolio Management Office Project (10/2022 to 10/2024)
Dawn supported USVI with the development and approval of APDs to support key program initiatives. Dawn also provided project management support for key initiatives to support and enhance the USVI Medicaid program.

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

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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 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.

Garrnet 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

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Fei Zou, MS

SENIOR CONSULTANT
Berry, Dunn, McNeil & Parker, LLC

Fei Zou is an experienced analyst with more than 10 years of experience in the healthcare industry, including nine years with a major New England Medicaid MCO. She is proficient in SAS, SQL, and Excel and is familiar with medical and pharmacy claims, Healthcare Effectiveness Data and Information Set, Centers for Medicare & Medicaid Services (CMS)/NCQA measures, Diagnosis Related Group, and risk adjustment.

EDUCATION AND CERTIFICATIONS

MS, Mathematical Science, University of Massachusetts Lowell

BS, Applied Mathematics, Tongji University

SAS Certified Advanced Programmer for SAS 9

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

3 Years

KEY QUALIFICATIONS

- 12+ years of Medicaid experience including over three years of experience with a state Medicaid agency
- 10+ years of experience working in healthcare analytics
- Familiarity with healthcare-related terminologies and coding systems
- Proficiency in SQL, SAS, and data visualization tools
- Experience working with quality measures and familiarity with technical specifications and quality improvement programs

PROJECT EXPERIENCE

BerryDunn (07/2021 to present)

Fei is working as a senior healthcare analyst in the Health Analytics Practice Group. She leads the generation of monthly financial reports, provider reports, and ad hoc and routine descriptive and predictive analyses for multiple clients. She also supports data collection, data preparation, data validation, and data warehouse building in different projects.

- **New Hampshire Insurance Department (NHID) (07/2023 to present)**

Fei plays a key role in the health cost transparency initiative by managing regular updates to the NH health cost website, helping ensure accurate and up-to-date information for consumers. She provides in-depth analysis for healthcare providers, offering insights into cost trends and comparative benchmarks. She leads the data support for the analysis of healthcare professional administered drugs. She helps implement automation initiatives to streamline the manual reporting processes.

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— **West Virginia Department of Human Services (DoHS)**
Child Welfare Initiatives Project Management Services (07/2021 to present)
Fei coordinates the data collection efforts from various BMS and BSS vendors, helping to ensure timely and accurate delivery of data to support the Office of Quality Assurance for Children's Programs (OQA)'s reporting. She conducts thorough data quality review and analysis to maintain high standards of data accuracy and process reliability, which further guides the data collection workflow changes and requirement specifications. Fei plays a key role in supporting the ingestion and implementation of systems and program data into the data store. She is also on the core team to meet regularly with BMS and BSS program teams to support the generation of monthly, quarterly, semi-annual, prototype, and ad hoc/stop-gap reports, analyses, and visualizations to meet OQA's reporting and CQI program operation needs.

Data Improvement Project (07/2021 to 10/2024)
Fei supported the data reconciliation efforts during the MMIS warehouse migration, helping to ensure accuracy and consistency between legacy and new systems. She was on the core technical team that developed and implemented effective strategies and technical solutions to identify data issues, including duplications, unusual trends, and mismatched information. She collaborated with vendors in recommending resolutions to address identified data quality issues.

— **Community Care Behavioral Health (CCBH) (07/2021 to present)**
Fei leads the generation of monthly financial reports, which provides CCBH, a Medicaid behavioral health MCO, with extensive insights of cost trending and supports the regulatory reporting submission to Pennsylvania's Medicaid agency. She spearheads efforts to streamline the report generation process, identifying inefficiencies and implementing solutions to enhance efficiency and accuracy; and conducts ad hoc trend analysis to identify patterns and anomalies. She executes precise data manipulation for actuarial models, helping to ensure accuracy and integrity in complex financial calculations.

— **Massachusetts Health Policy Commission (01/2021 to present)**
She supports economists by providing complex datasets derived from various data sources, enabling them to conduct in-depth analysis and make decisions. She also performs ad hoc customer-specified complex analyses, leveraging her ability to refine logical definitions and extract valuable insights from the data. Her expertise allows her to offer thoughtful suggestions from a data perspective.

BMC Health System (formerly HealthNet Plan) (08/2012 to 07/2021)
Fei worked as a health data analyst II, senior health data analyst, and senior medical economics analyst. She led the development and production of regulatory reports to the Massachusetts Executive Office of Health and Human Services, the New Hampshire DHHS, and CMS, including NCQA/PQA measures. She developed and analyzed monthly reports to identify high risk/high utilization members for care management. Fei supported strategic planning including risk adjustment and quality improvement initiatives. She created a results tracking dashboard for utilization trends, quality measure compliance, and care management operations for both internal and external clients. Fei also investigated unusual utilization trends, built and maintained a profitability database for an ACO model, and worked on the claim service categorization from the design phase to the UAT phase. She was responsible for code migration and impact analysis for the ICD9/ICD10 transition and training for new hires.

Health Dialog (08/2010 to 08/2012)
Fei worked as an evaluation analyst designing and coding models to estimate clinical outcomes and financial impact. She consulted with internal and external customers for an appropriate analysis plan and debugged, reviewed, and wrote Standard Operating Procedures for products.

b, BerryDunn

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™)

**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 seven years' experience developing and leading training and onboarding
- Over six years' experience working with single state Medicaid agencies
- Over six years of office management
- Over five years of SharePoint document management
- Over four years certification support for Missouri DSS
- One year experience creating e-learning courses in Articulate products
- One 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

PROJECT EXPERIENCE

BerryDunn (04/2018 to present)

– **Iowa Department of Health and Human Services (IA HHS)**
Quality Management System (QMS) (01/2025 to present)

b, BerryDunn

Grady Black

CONSULTANT
Berry, Dunn, McNeil & Parker, LLC

A graduate in data analytics, Grady brings a variety of skills in database management, programming, statistics, and regression analysis. He has experience with Java, Python, R, Excel, Microsoft Access, Oracle, and SQL. Upon starting at BerryDunn as an intern in the summer of 2022, Grady has been learning programming and database principles along with the nuances of healthcare data and healthcare coding practices. After interning with the firm, Grady joined BerryDunn as a full-time employee.

EDUCATION AND CERTIFICATIONS

BS, Data Analytics, Bentley University

Dean's List and President's List honors

Graduated with Magna Cum Laude honors

PROPOSED PROJECT ROLE

Project Management Support Staff

MEDICAID EXPERIENCE

2 years

KEY QUALIFICATIONS

- Languages/Applications: SQL, SQL Server Management Studio, SAS, R, Python, Excel, Tableau, PowerBI

- Experience in data quality reviews and quality control measures to highlight discrepancies in healthcare data

- Skilled in data visualization for data-driven decision-making

PROJECT EXPERIENCE

BerryDunn (06/2022 to present)

Grady works with BerryDunn's Health Analytics Practice Group. Within the Data Management and Strategy practice, Grady often uses various coding languages and statistical software such as Python, SQL, and SAS as well as data visualization tools like Tableau, PowerBI, and Excel. Providing technical support for the team, Grady engages in data profiling, data quality analysis, and data visualization. Grady also focuses on quality control and assists in database development.

— West Virginia Department of Human Services (DoHS)
CWI Project Management Services(07/2022 to present)
Grady supported the CWI project by gathering relevant requirements, creating data dictionaries, crafting a data structure for seamless data entry, and generating visuals to describe pertinent trends in CWI data. Grady developed a program that tracks data discrepancies and fluctuations across weekly extract loads, which allowed for the database management team to address potential data quality issues and efficiently address client needs and questions. Grady is currently developing Tableau dashboards to automate and optimize weekly and monthly Residential Mental Health Treatment Facility reporting measures.

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– **West Virginia Bureau for Medical Services (BMS)**
Data Improvement Project (05/2022 to present)
As part of the DIP, Grady has assisted in developing mapping documents, running ad hoc analyses, and developing data profiling reports.

Data Integration Hub (06/2024 to 11/2024)
Grady engaged in developing database objects and ETL mechanisms in the cloud computing platform Snowflake. Grady was exposed to AWS programs and services like Simple Storage Service (S3) and Lambda functions. Using both Python and SQL coding languages, Grady developed data quality check functions and performed data quality analyses.

– **Community Care Behavioral Health (CCBH)**
Actuarial Services (10/2023 to 04/2024)
Grady supported BerryDunn's actuarial team by troubleshooting production code and producing data visualization dashboards in Tableau to create dynamic views for relevant data points across CCBH contracts.

– **Town of Falmouth, ME**
Comprehensive Plan (11/2023 to 12/2023)
In support of BerryDunn's Local Government Practice Group, Grady assisted in the presentation of survey results via the manipulation of survey data and the collaborative creation of a public, interactive data dashboard.

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Caitlin Cabral

DOCUMENTATION SPECIALIST
Berry, Dunn, McNeil & Parker, LLC

Caitlin Cabral is a Poynter-ACES-certified member of the BerryDunn Editorial/QA (EQA) 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.

EDUCATION AND CERTIFICATIONS

BA, Psychology, University of Hartford

Poynter American Copy Editors Society (ACES) Certificate in Editing

PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

5 years

PROJECT EXPERIENCE

BerryDunn (09/2021 to present)

As a member of BerryDunn's 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.

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EDUCATION AND CERTIFICATIONS

BA, Human Resource Management, University of Arizona

Professional in Human Resources (PHR)

Society for Human Resource Management – Certified Professional (SHRM-CP)

PROPOSED PROJECT ROLE

Project Management Support Staff

MEDICAID EXPERIENCE

1 year

AFFILIATIONS AND MEMBERSHIPS

- SHRM Member
- Global Organization Network (GIODN) Member

Hope Connard, PHR, SHRM-CP

MANAGER
Berry, Dunn, McNeil & Parker, LLC

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

PROJECT EXPERIENCE

BerryDunn (12/2019 to present)

– **West Virginia Bureau for Medical Services (BMS)**
Medicaid Information Technology Architecture (MITA) 3.0 State Self-Assessment (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 SS-A update under MITA.

Organization Development Project (06/2024 to present)
Serving as a 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.

b, BerryDunn

Engagement Support (05/2024 to present)
Hope supports BMS engagements 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 OCM expertise that supported the Organization Transformation Project.

– **Hawai'i Department of Human Services Med-QUEST Division (MQD)**
Organizational and Business Process Redesign (12/2023 to 07/2024)
As co-lead, Hope provided OCM expertise that supported the Organization Transformation Project for Hawai'i'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. 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, 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 and payroll administration, and drove enhancements in HR processes. She played an active role in employee engagement initiatives and supported training and development programs in WV 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 and data analysis, and aided in implementing a new inventory platform. Hope's unwavering dedication to continuous improvement, particularly through her engagement with Kaizen programs, epitomized her commitment to operational excellence.

IT Alliance of Appalachian Ohio (04/2003 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.

b BerryDunn

KD Dobyne

PROJECT COORDINATOR

Berry, Dunn, McNeil & Parker, LLC

KD Dobyne is an experienced project coordinator, bringing administrative support and project assistance experience. 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 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, 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

b. BerryDunn

potential students and parents by creating a welcoming admissions office environment and leading informational campus tours.

b BerryDunn

Carole Ann Guay

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

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, 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 and deliverable assistance on numerous projects.

EDUCATION AND CERTIFICATIONS

BS, Accounting, University of Southern Maine

PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

9 years

PROJECT EXPERIENCE

BerryDunn (10/2014 to present)

– **Puerto Rico Medicaid Program**

Enterprise Objective Monitoring and Control (EOMC) Services (09/2023 to present)

Carole Ann assists with review and updates of deliverables.

– **Maine Department of Corrections (DOC)**

Offender Management System (OMS) Consulting Services (11/2021 to present)

Carole Ann developed high-level workflow diagrams for the BerryDunn team assessing business processes, crafting cost benefit analyses, developing an 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 since 2016. Carole Ann

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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)**

Assessment of Current Licensing System and Development of a Transition Scope of Work (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 SOW for AZDA's IT Modernization Strategic Initiative.

– **Montana Department of Corrections (MDOC)**

OMS Procurement (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)**

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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 (OR ETS)

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

E&E Independent Security and Privacy Controls Assessment (01/2017 to 07/2017)

Carole Ann served as an analyst for WV 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

Case Management System Planning and Implementation Services (04/2017 to 06/2017)

Carole Ann provided deliverable support, as well as data gathering and organization for this project. She also participated in on-site fact-finding meetings.

– Washington State Auditor's Office (SAO)

Local Government IT Security Audits (11/2014 to 06/2017)

Carole Ann served as a technical analyst assisting in the performance of information security audits for various municipalities throughout the State of Washington, sponsored by the SAO, conducting assessment activities and analysis of current environments. The team assisted in identifying threats, vulnerabilities, and risks, in addition to providing recommendations for remediation.

Webber Energy Fuels (2004 to 2014)

As the office coordinator, Carole Ann oversaw several operations, including payroll for office staff

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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, helping ensure new customer satisfaction, and directly assisted the branch manager in all daily office operations.

b BerryDunn

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.

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

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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.

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Hailey Holden

STAFF CONSULTANT
Berry, Dunn, McNeil & Parker, LLC

Hailey Holden 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 five years of successful development, design, and implementation of business processes, education, and training

PROJECT EXPERIENCE

BerryDunn (07/2022 to present)

Hailey is a consultant for BerryDunn's MPG. Hailey supports a variety of practice group initiatives, including supporting the BerryDunn Medicaid Learning Center, WV Operations Improvement Team, and MPG Resource Library.

— **West Virginia Bureau for Medical Services (BMS)**
West Virginia Engagement Coordinator (07/2022 to present)
As the engagement coordinator, Hailey 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, helping ensure 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

b BerryDunn

eLearning courses for BMS.

APD Assistance (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 WV and the USVI, 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 clients' needs to create and implement solution-focused plans of action to meet and exceed those 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 100 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 400 people.

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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

PROJECT EXPERIENCE

BerryDunn (08/2020 to present)

– **West Virginia Department of Human Services (DoHS)**
People's Access to Help (PATH) DDI Project Management (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 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 help ensure that the documents reflect functionality within the system and works with the vendor and the client to address any gaps.

– **West Virginia Bureau for Medical Services (BMS)**
1915(c) CSED Waiver Development Project (08/2020 to 12/2022)
Samuel acted as a project coordinator and performed a variety of responsibilities for the project 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.

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

b. BerryDunn

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 helped ensure 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, helping 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.

b. BerryDunn

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 Kirk is an experienced project coordinator and consultant with an extensive knowledge of documentation, communications, and scheduling needs related to MES development. Her attention to detail and complex organization skill sets have allowed her to be a valuable team member across multiple projects, with the ability to assist in drafting contract deliverables, tracking action items, risk, and issues, developing and distributing project agendas and meeting materials, as well as aiding in the creation of Statements of Works 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, review cycles, and submission of key client service deliverables, including executive and Centers for Medicare & Medicaid Services (CMS) status reports, SOWs, APDs, and RFPs

- Three years expertise in cultivating, coordinating, and managing relationships between interested and invested parties to help secure successful project outcomes

PROJECT EXPERIENCE

BerryDunn (10/2022 to present)
Kourtney is a senior consultant with BerryDunn's MPG. Kourtney provides support to BMS, WV's 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)**
CLMS RFP Development (01/2025 to present)

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- **West Virginia Department of Human Services (DoHS)**
Business Intelligence (BI) and Enterprise Data Solution (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 Project Management Office (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.

People's Access to Help (PATH) DDI Project Management (10/2022 to present)
Medicaid EDS Implementation and CMS Certification Project (08/2020 to 01/2022; 10/2022 to present)
As a project coordinator and business analyst supporting DoHS, Kourtney has a wide range of project duties. She creates agendas, 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.

Medicaid and Children's Health Insurance Program (WVCHIP) Enterprise System (MCES) Procurement Assistance Project (08/2020 to 01/2022)
As a project coordinator for PATH, EDS, and MCES projects, Kourtney has a wide range of project duties. She creates agendas, maintains meeting schedules, and provides quality control for meeting materials to satisfy contract 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.

- **West Virginia Bureau for Medical Services (BMS)**
Systems Development Life Cycle (SDLC) Coordination Project (06/2024 to present)
Tek Systems (03/2021 to 01/2022)
As a subcontractor through Tek Systems with BerryDunn, Kourtney created agendas and maintained meeting schedules for WV DoHS, IBM®® Watson Health, and BerryDunn. She created agendas, 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 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

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

Total Quality Logistics (11/2018 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 with 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 GSC 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 GSC.

b, BerryDunn

Skye Kwong

CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

Skye Kwong is an experienced consultant in BerryDunn's State Government Consulting Group, specializing in public health and project management engagements supporting assessments, strategic planning, and data analysis. She excels in performing research, coordinating engagement activities, monitoring and reporting tasks, and developing deliverables.

EDUCATION AND CERTIFICATIONS

BA, Economics and Biology, Morrisey College of Arts and Sciences, Boston College

PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

2 years

PROJECT EXPERIENCE

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

— **Guam Department of Public Health and Social Services (DPHSS)**

Enterprise Program Management Office (EPMO) (10/2024 to present)

Skye serves as a project coordinator and analyst in the E&E project, providing support in business process redesign and policy analysis. She also serves as a project coordinator in Pharmacy Benefits Management (PBM) implementation and Interoperability project.

— **Kentucky Department of Community-Based Services (DCBS)**

Adult Protective Services Statewide Needs Assessment (01/2025 to present)

Skye serves as an analyst in this project to support the development a Needs Assessment and make recommendations on the APS State Plan. She provides support in data collection, deliverable development, and peer state research.

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

Immunization Strategic Plan (04/2024 to present)

Skye serves as a project coordinator and analyst in this project to develop a strategic plan for the North Dakota Immunization Unit. She provides support in data collection, producing data visuals, and coordinating data collection efforts.

— **West Virginia Bureau for Social Services (BSS)**

Child Welfare Initiatives Project (08/2023 to present)

Skye works as a project coordinator to assist in project tracking, monitoring, and producing meet support materials.

— **Iowa Department Health and Human Services (IA HHS)**

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Corporate Technology Cost Allocation Project (05/2024 to 09/2024)

Skye served the Cost Allocation project as a business analyst. She worked on data collection, data presentation, and project coordination to support IA HHS in developing a new cost allocation and rate-setting methodology.

– West Virginia Bureau for Public Health

Newborn Screening Process and Procedure Development (01/2024 to 06/2024)

Skye supported the Newborn Screening project as a project coordinator. She developed process maps of key procedures, conducted peer state background research, and supported the documentation of several processes.

Data Modernization and HIV and Hepatitis Elimination Plan Project Management (09/2023 to 06/2024)

Skye served as a project coordinator, supporting the Data Modernization implementation of a strategy and process to monitor project activities and data.

State Health Assessment, State Health Improvement Plan, and Workforce Development Project Management Support (07/2023 to 06/2024)

Skye served as a project coordinator and provided project support with data collection and presentation development.

Accreditation Readiness Support (08/2023 to 05/2024)

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

– Wyoming Department of Health Public Health Division (PHD)

Performance Management / Quality Improvement (PM/QI) and Strategic Plan Support (06/2023 to 05/2024)

Skye supported the PM/QI project with developing a needs assessment to assess PHD's PM/QI knowledge, analyzing findings of the assessment, and adapting PM/QI trainings.

– North Dakota Department of Health and Human Services, Developmental Disabilities Services

Workforce Development Needs Assessment (10/2023 to 01/2024)

Skye supported the Workforce Training Assessment project as a business analyst. She provided support on peer state research, project coordination, and data collection and analysis to support the development of an assessment of North Dakota's Disability Section workforce training.

U.S. Government Accountability Office (GAO) (09/2021 to 04/2022)

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

b, BerryDunn

Homes for Families (HFF) (06/2021 to 08/2021)

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

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

As a policy intern, Skye planned and produced legislative proposals regarding housing, education, and environmental issues. She developed and implemented various fundraising strategies to improve efficiency and scale of donations, organized events and speaking engagements to promote communication between the candidate and voters, and provided important feedback from community members to the candidate about necessary issues that had yet to be addressed.

b. BerryDunn

Grace Min

DOCUMENTATION SPECIALIST

Berry, Dunn, McNeil & Parker, LLC

Grace Min is an experienced technical writer and editor, bringing experience in copywriting, project management, research, quality assurance, and proofreading.

EDUCATION AND CERTIFICATIONS

BA, English Literature, *summa cum laude*, Oral Roberts University

PROPOSED PROJECT ROLE

Project Management Support Staff

RELATIVE EXPERIENCE

8 years

PROJECT EXPERIENCE

BerryDunn (11/2024 to present)

Grace supports the consulting services group, working on the EQA team. Grace reviews, formats and copyedits client deliverables, along with SLAs.

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 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.

b. BerryDunn

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.

b, BerryDunn

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 WV 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 to 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 RFPs; 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.

b BerryDunn

- **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 RFPs; 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 a 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.

b. BerryDunn

Cate Poling

SENIOR CONSULTANT
Berry, Dunn, McNeil & Parker, LLC

Cate Poling 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, RFPs, meeting agendas and notes, and other project documentation. She presents a well-developed understanding of project and system requirements as relates to MES 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).

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

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, SOWs, APDs, and 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 M&O projects

PROJECT EXPERIENCE

BerryDunn (06/2021 to present)

As a consultant, Cate supports a variety of critical WV and Iowa state Medicaid agency projects and initiatives across various

b BerryDunn

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's needs and deliverables.

- **Iowa Health and Human Services (HHS)**

Eligibility Integration Application Solution (ELIAS) (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)**

SDLC Coordination Project (06/2024 to present)
As project manager, Cate supports the transition of the DIP body of work, working with the technical advisory and change management team 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 TMSIS 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.

DIP Phase IV (06/2023 to 06/2024)
As a project manager, Cate assisted with refining, expanding, and initiating the DIP 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 and Children's Health Insurance Program (WVCHIP) 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.

People's Access to Help (PATH) DDI Project Management (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 SLAs.

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,

b, BerryDunn

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 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 CMS Streamlined Modular Certification (SMC) guidance.

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 time 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/notetaking requiring measurements and special testing prior to patient-doctor encounters, including triaging, refractometry, checking visual acuity, visual field testing, checking intraocular pressure, and administering ophthalmic medications to patients.

She worked directly with Medicare, Medicaid, and commercial plans to help ensure patient coverage for medications and procedures and assisted in providing cost-reducing programs to patients; provided patients prescriptions through e-prescribing and via telephone and fax; arranged pertinent diagnostic and medical procedures for patients, including obtaining prior authorizations and scheduling, and necessary transportation assistance within required time frames. Cate provided scheduling support and patient flow management; helped ensure all patients 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 email queue daily; recorded, maintain, and changed provider tax identification records, and coordinated efforts with the Finance Department related to annual 1099 filing.

Wal-Mart Supercenter (08/2014 to 09/2015; 05/2009 to 01/2012)
Cate was an associate providing remarkable customer service in a fast-paced working

b, BerryDunn

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

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/notetaking. 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.

b BerryDunn

Jordan Ramsey, MA, LSSGB

DOCUMENTATION SPECIALIST
Berry, Dunn, McNeil & Parker, LLC

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 ACES Certified Editor and Lean Six Sigma Green Belt, and holds a MA in English: Professional Writing.

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

PROJECT EXPERIENCE

BerryDunn (07/2019 to present)

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.

b. BerryDunn

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.

b BerryDunn

John Reilly

CONSULTANT
Berry, Dunn, McNeil & Parker, LLC

John Reilly is a member of the BerryDunn Health Analytics Practice Group supporting our clients with data analytics, database management, applied statistics, and programming.

EDUCATION AND CERTIFICATIONS

BS, Applied Mathematics and Statistics, Minors in Information Systems and Biology, Bryant University

Certified Associate Python Programmer (PCAP)

PROPOSED PROJECT ROLE

Project Management Support Staff

MEDICAID EXPERIENCE

1 Year

KEY QUALIFICATIONS

- Certified Associate Python Programmer (PCAP): Certification Link
- Languages/Applications: T-SQL, PL/SQL, Excel, Python, SAS, R, SQL Server Integration Services (SSIS), Snowflake, AWS Lambda

PROJECT EXPERIENCE

BerryDunn (06/2023 to 05/2024; 07/2024 to present)
As a member of the BerryDunn Health Analytics Practice Group, John assists the team and clients with business analysis, data quality analysis, and data profiling. Additionally, John assists in the development of data engineering pipelines.

— **Portland Public Schools, ME**
Data Reconciliation Project (11/2024 to present)
John is providing technical support to assist the school district with reconciling data between internal systems. He provides support by leveraging languages such as SAS and SQL to automate previously manual processes.

— **West Virginia Department of Human Services (DoHS)**
CWI Project Management Services (08/2024 to present)
John is supporting development of the data store, visuals, and reporting for the CWI project. He uses SQL and SSIS to develop ETL pipelines to help populate modules in the data store. Additionally, he has utilized SharePoint Lists to create a Report Prototyping Tracking Tool proof of concept (POC).

— **West Virginia Bureau for Medical Services (BMS)**
Data Improvement Project (06/2023 to 01/2025)
John supported the project by assisting in developing mapping documents, running ad hoc analyses, and developing data profiling reports.

b BerryDunn

Data Integration Hub (07/2024 to 10/2024)

John provided systems development, testing, and assistance with maintaining data architecture for the Data Integration Hub. He developed and tested modular SQL stored procedures that helped the Data Integration Hub ingest data. He also assisted with security monitoring of the Data Integration Hub by developing an AWS Lambda function that collected security-related metadata from Snowflake and pushed it to AWS CloudWatch.

Concord Group Insurance (05/2022 to 08/2022)

John served as a commercial lines underwriting analytics intern where he discovered significant large loss trend based on policy form of business, policy state, previous claims, and pay history. He was also responsible for assembling datasets from policy admin systems and he reviewed new business proposals, renewals, and inspections.

b, BerryDunn

Courtney Rombow, PMP®, Prosci® CCP

PROJECT COORDINATOR

Berry, Dunn, McNeil & Parker, LLC

Courtney Rombow is an experienced project management professional with more than 15 years' experience supporting various teams, offices, and projects. She has demonstrated skills in organization, planning, and training, with a focus in project management support. Through her work, she has refined superior organizational skills, detail-oriented problem-solving abilities, and has become a successful and confident communicator. Courtney is particularly adept at supporting and promoting collaborative communication processes, streamlining solutions, and developing and reviewing project-specific documentation.

EDUCATION AND CERTIFICATIONS

Certified Project Management Professional® (PMP®)

Certified Office Manager, National Association of Certified Bookkeepers

Prosci® Certified Change Practitioner

PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

12.5 years

PROJECT EXPERIENCE

BerryDunn (10/2018 to 12/2019; 01/2022 to present)

– West Virginia Bureau for Social Services (BSS)

Child Welfare Initiatives Project (01/2022 to present)

Courtney works as a senior project coordinator to assist in preparing presentations, developing and reviewing project deliverables, and conducting research and analysis for various project-related activities and tasks. She schedules, facilitates, and manages meetings and project-related tracking logs. She acts as proofreader, has developed onboarding materials for new hires, and provides orientation and job training.

TC Energy (09/2020 to 08/2021)

Courtney worked as a project support analyst to provide administrative support, collect external labor hours and mileage, and act as document controller of tenure construction documents that were collected and managed. She compiled weekly and monthly reports, established and maintained the project repository website, and tracked and reported project

b. BerryDunn

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

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

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

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

Maxim Crane Works (03/2011 to 09/2017)

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

b. BerryDunn

EDUCATION AND CERTIFICATIONS

BA, Computer Science, Colby College

PROPOSED PROJECT ROLE

Project Management Support Staff

MEDICAID EXPERIENCE

1 year

Brett Torra

CONSULTANT
Berry, Dunn, McNeil & Parker, LLC

Brett Torra is a data engineer with BerryDunn's Health Analytics Practice Group where he assists with the analysis of healthcare data, develops data engineering pipelines, and provides automated testing for data management system components. He can apply skills such as Python, Git, SQL, SAS, Dagster, and numerous forms of scripting in relevant projects and services for clients. He can translate his programming expertise into any technical context, including data analysis, orchestrating ETL pipelines, and automating data engineering workflows with continuous integration, continuous delivery (CI/CD).

KEY QUALIFICATIONS

- Python, JavaScript, Git, GitHub, Shell Scripting, Dagster, AWS, Snowflake, SQL, SAS, Django, Bash, C#, R, Microsoft Office Suite

PROJECT EXPERIENCE

BerryDunn (07/2024 to present)

– **Portland Public Schools, ME**
Data Reconciliation Project (11/2024 to present)
Brett is helping the school district to develop an automated system for reconciliation of internal data systems, previously done manually, using SQL and SAS.

– **West Virginia Department of Human Services (DoHS)**
Child Welfare Initiatives Project Management Services (08/2024 to present)
Brett is assisting with gaining a robust understanding of incoming data through the development of the data store, capturing data quality issues, gathering necessary requirements, and creating data dictionaries.

– **West Virginia Bureau for Medical Services (BMS)**
Medicaid and Children's Health Insurance Program (WVCHIP) Enterprise System (CES) Data Integration Hub (07/2024 to 11/2024)
Brett designed and implemented data orchestration pipelines using Python and Dagster to orchestrate ETL workflows between Snowflake and AWS resources. Additionally, he implemented CI/CD concepts into data engineering pipelines with GitHub and Shell Scripting to test and deploy ETL components across environments. He also assisted in the creation of SQL stored procedures to clean, check, and analyze

b. BerryDunn

ingested data.

PTC (06/2023 to 08/2023)
Brett worked as a software engineer intern and developed CI/CD pipelines using Shell Scripting to deploy application versions with Heroku across environment stacks. He also debugged server-side API and cookie errors in JavaScript for a web application.

Colby College (09/2022 to 07/2024)
Brett served as a research assistant and led a team for developing an eye tracking software using Python with PyQT that provides manual and automated data correction methods and analysis in an interactive GUI.

Visterra Inc. (06/2022 to 08/2022)
Brett worked as a web developer intern where he created an internal website using JavaScript for displaying a variety of company statistics and information. He also developed a custom search engine for company data.

b. BerryDunn

Joseph "Joey" Tumblin, MS

SENIOR HEALTHCARE ANALYTIC PROGRAMMER
Berry, Dunn, McNeil & Parker, LLC

Joey is an experienced programmer with three years of experience at a large pharmaceutical company, as well as over four years of experience using SAS to mine, aggregate, and analyze data as an analyst within a healthcare system.

EDUCATION AND CERTIFICATIONS

MS, Applied Biostatistics, Boston University

BA, Mathematics, College of the Holy Cross

PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

8.5 years

KEY QUALIFICATIONS

- Regular SAS and Excel user
- Experience with SDTM, ADaM, and Clinical Data Interchange Standards Consortium (CDISC) standards
- Experienced in Stata, CITI Certifications – Biomedical Researchers, Biomedical Responsible Conduct of Research

PROJECT EXPERIENCE

BerryDunn (11/2023 to present)
Joseph is a senior healthcare analytic programmer with BerryDunn's Health Analytics Practice Group (HAPF). Since joining BerryDunn, Joey has performed data analysis for MassHealth Continuous Skilled Nursing biennial study, worked on several Prospective Mandate Reviews for MA CHIA, worked on the 2024 Comprehensive MBR for MA CHIA, and worked to complete deliverables for several review cycles for WV's Office of Management Information Services (OMIS).

– WV Department of Human Services (DoHS) (12/2023 to present)
Joey helps to produce monthly, quarterly, and semi-annual report packages to meet the reporting needs of the DoHS Office of Quality Assurance for Children's Programs (OQA). He also helps with report prototyping and addressing ad hoc reporting requests to support OQA's operational needs. He is currently working on prototyping several summary dashboards.

– Massachusetts Center for Health Information and Analysis (12/2023 to present)
Joey worked on several MBRs, including ones related to access to nurse-midwifery services, access to breast pumps, and access to cancer biomarker testing. Joey wrote SAS code to query the Massachusetts APCD to help create analytical datasets for actuaries. Joey is currently working on the 2024 Comprehensive MBR.

BerryDunn

Pfizer (09/2020 to 11/2023)

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

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

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

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Jonathan "Jon" 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

Lean Six Sigma Green Belt (LSSGB)

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), 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

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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.

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Appendix B: Deliverable Dictionary

Table 4: Deliverable Dictionary

Deliverable ID	Deliverable Name	Deliverable Description
01	Monthly 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	Action item, risk, issue, and decision logs	Logs containing action items, risks, issues, and key decisions, respectively. These may be captured during project meetings and during project activities, via correspondence with stakeholders, and at the request of BMS. The logs will be maintained on the BerryDunn project SharePoint site.
05	Meeting agendas and notes	All meeting agendas and notes
06	Final policy and process documents	All final policy and process documents related to bureau specific programs
07	Key Performance Indicators (KPIs) and associated data collection per the CQI plan, including vendor data	KPI definitions and source data collection specifications/data dictionary
08	QA/PI logic specifications for performance measures per the DOJ Agreement	QA/PI measure definitions and logic specifications per DOJ Agreement
09	Specifications, implementation, and deployment package for QA/PI data store to support dashboards and CQI reporting, associated data transformation code, and associated documentation for OMIS	Code and reporting dashboard deployment files/packages and associated instruction and training documents delivered at module release to OMIS
10	Dashboards to support programs in the DOJ Agreement	Development and delivery of formal automated reporting dashboard to support DOJ Agreement
11	Analytical support for CQI reporting	Ad hoc or manual reporting and analysis to support CQI
12	Results and documentation of ad hoc data analysis requests	Code and logic specifications (as needed) associated with ad hoc data analysis

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Deliverable ID	Deliverable Name	Deliverable Description
13	Documentation and training for dashboard users and analysts	Tutorial and training documents for formal automated dashboard reporting users
14	Sub-Project Management Materials	Any documents created because of an approved sub-project as outlined in the DDI
15	Implementation Advance Planning Document (IAPD)	The IAPD will be developed in compliance with requirements, including, but not limited to, 45 Code of Federal Regulations (CFR) 95.610. An implementation project management approach will also be submitted with this deliverable.

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Appendix C: Acronyms/Abbreviations

Table 5: Acronyms/Abbreviations

Acronym/Abbreviation	Definition
AABD	Aid to the Aged, Blind and Disabled
AALMPP	AzCCATS, and LIHEAP Modernization Planning Project
ABA	Applied behavior analysis
ACA	Affordable Care Act
ACES	American Copy Editors Society
ACF	Administration for Children and Families
ACO	Accountable Care Organization
ADES	Arizona Department of Economic Security
ADHS	Arizona Department of Health Services
AFCARS	Adoption and Foster Care Analysis and Reporting System
AFS	Administration and Financial Services
AHCCCS	Arizona Health Care Cost Containment System
APCD	All-Payer Claims Databases
APD	Advance Planning Document
APS	Adult Protective Services
ARRA	American Recovery and Reinvestment Act
ASO	Administrative service organization
AVS	Asset Verification System
AWS	Amazon Web Services
BBH	Bureau for Behavioral Health
BCF	Bureau for Children and Families
BerryDunn	Berry, Dunn, McNeil & Parker, LLC
BHRS	Behavioral Health and Recovery Services
BHS	Behavioral Health Support
BI	Business Intelligence
BMS	Bureau for Medical Services
BPH	Bureau for Public Health
BSS	Bureau for Social Services
CAD	Continuous Analgesia Device
CANS	Child and Adolescent Needs and Strengths
CASA	Court Appointed Special Advocate

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Acronym/Abbreviation	Definition
CCBH	Community Care Behavioral Health
CCBU	Customer Contact Business Unit
CCMS	Child Care Management System
CCRL	Children's Crisis and Referral Line
CCWIS	Comprehensive child welfare information system
CDISC	Clinical Data Interchange Standards Consortium
CDT	Current Dental Terminology
CECL	Current Expected Credit Loss
CFO	Chief Financial Officer
CFSD	Child and Family Services Division
CFSR	Child and Family Services Review
CHIP	Children's Health Insurance Program
CIO	Chief Information Officer
CL	Commodity Lines
CLMS	Contract Labor Management Services
CMCRS	Children's Mobile Crisis Referral and Stabilization
CMS	CHECK TEXT / EXISTING GLOSSARY FOR DEFINITION
COC	Certified Outpatient Coder
COO	Chief Operating Officer
COTS	Commercial Off-the-Shelf
CPC	Certified Professional Coder
CPT	Current Procedural Terminology
CQI	Continuous quality improvement
CSED	Children with Serious Emotional Disorders
CSI	Claims System Implementation
CSS	Child Support Services
CWI	Child Welfare Initiatives
CYSHCN	Children and Youth with Special Health Care Needs
DAFS	Department of Administrative and Financial Services
DAIL	Department for Aging and Independent Living
DBH	Division of Behavioral Health
DBHDS	Department of Behavioral Health and Developmental Services
DCBS	Department of Community-Based Services
DCS	Data Center Services

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Acronym/Abbreviation	Definition
DD	Developmental disability
DDD	Division of Developmental Disabilities
DDI	Design, develop, and implement
DEIBA	Diversity, Equity, Inclusion, Belonging, and Access
DEP	Department of Environmental Protection
DGT	Digital Government Transformation
DHHS	Department of Health and Human Services
DHS	Department of Human Services
DIP	Data Improvement Project
DLA	Division of Legislative Audit
DLL	Department of Liquor and Lottery
DMAHS	Division of Medical Assistance and Health Services
DMAS	Department of Medical Assistance Services
DMS	Data Management Strategy
DNR	Department of Natural Resources
DOC	Department of Corrections
DOH	Department of Health
DoHS	Department of Human Services
DOJ	U.S. Department of Justice
DOLIR	Department of Labor and Industrial Relations
DOR	Department of Revenue
DPH	Department of Public Health
DPHHS	Department of Public Health and Human Services
DPHSS	Department of Public Health and Social Services
DPI	Department of Public Instruction
DRA	Department of Revenue Administration
DRG	Diagnosis Related Grouping
DSHS	Department of Social and Health Services
DSS	Department of Social Services
DWD	Department of Workforce Development
DWIHN	Detroit Wayne Integrated Health Network
E&E	Eligibility and Enrollment
ECM	Enterprise Change Management
EDI	Electronic Data Interchange

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Acronym/Abbreviation	Definition
EDQ	Encounter Data Quality
EDS	Enterprise Data Solution
EFS	Enterprise Financial Solution
EHR	Electronic health record
EIE	Enterprise Integrated Eligibility
EIS	Enterprise Information Services
ELA	English Language Arts
ELS	Electronic licensing system
EMR	Electronic medical record
EMS	Emergency Medical Services
EOMC	Enterprise Objective Monitoring and Control
EPMO	Enterprise Program Management Office
EQA	Editorial/Quality Assurance
ERP	Enterprise Resource Planning
ETL	Extract, Transform, and Load
EVV	Electronic Visit Verification
FDA	Food and Drug Administration
FFPSA	Family First Prevention Services Act
FFS	Fee-for-service
FMS	Financial Management System
FQHC	Federally Qualified Health Centers
GFO	Governor's Finance Office
GHS	Goold Health Systems
GMCB	Green Mountain Care Board
GNB	Government of New Brunswick
GPM	General Project Manager
GRC	Governance, Risk, and Compliance
GSC	Glenville State College
HAPG	Health Analytics Practice Group
HBE	Health Benefit Exchange
HCA	Health Care Authority
HCBS	Home- and community-based services
HCPCS	Healthcare Common Procedure Coding System
HEDIS	Healthcare Effectiveness Data and Information Set

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Acronym/Abbreviation	Definition
HFF	Homes for Families
HHS	Health and human service
HIE	Health information exchange
HIPAA	Health Insurance Portability and Accountability Act
HIT	Health Information Technology
HRIS	Human Resources Information System
HVHC	High Value Healthcare Collaborative
IAP	Innovation Accelerator Program
IAPD	Implementation Advance Planning Document
ICSG	Internet Communications Software Group
ICSP	Integrated Children's Services Plan
IDAPA	Idaho Administrative Procedures Act
IDD	Intellectual Developmental Disabilities
IMM	Income Maintenance Manual
ITIL	Information Technology Infrastructure Library
ITO	Implementation Team Organization
ITSM	IT Service Management
IV&V	Independent Verification and Validation
JMS	Jail Management System
KPI	Key Performance Indicators
KUIP	Kentucky Unemployment Insurance Portal
L&D	Learning & Development
LIEAP	Low Income Energy Assistance Program
LMS	Learning Management System
LTC	Long-term care
M&O	Maintenance and operations
MBR	Mandated Benefit Reviews
MC	Managed Care
MCH	Maternal and Child Health
MCO	Managed Care Organization
MDHHS	Michigan Department of Health and Human Services
MDOC	Montana Department of Corrections
MDRS	Mississippi Department of Rehabilitation Services
MDS	Minimum Data Set

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Acronym/Abbreviation	Definition
MES	Medicaid Enterprise System
MESC	Medicaid Enterprise Systems Conference
MHP	Mountain Health Promise
MHT	Mountain Health Trust
MITA	Medical Information Technology Architecture
MLC	Medicaid Learning Center
MMB	Minnesota Management and Budget
MME	Missouri Medicaid Enterprise
MMIS	Medicaid Management Information System
MOU	Memorandum of understanding
MPG	Medicaid Practice Group
MQD	Med-QUEST Division
MSP	Modernization Strategy and Procurement
MSSP	Medicare Shared Savings Program
NCCI	National Correct Coding Initiative
NCPDP	National Council for Prescription Drug Programs
NESCSO	New England States Consortium System Organization
NHID	New Hampshire Insurance Department
NHLC	New Hampshire Liquor Commission
NMCD	New Mexico Corrections Department
NMFA	New Mexico Finance Authority
NPI	National Provider Identifier
O&M	Operations and Maintenance
OBC	Outcomes-Based Certification
OCM	Organizational Change Management
OCS	Office of Children's Services
OCYF	Office of Children Youth and Families
OD	Organizational Development
ODGT	Office of Data Governance and Transparency
ODM	Ohio Department of Medicaid
OHS	Office of Health Strategy
OIT	Office of Technology
OMES	Ohio Medicaid Enterprise System
OMHSAS	Office of Mental Health and Substance Abuse Services

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Acronym/Abbreviation	Definition
OMIS	Office of Management Information Services
OMS	Offender Management System
OOP	Out-of-Pocket
ORR	Operational Readiness Review
OSA	Office of State Auditor
OUD	Opioid Use Disorder
PASRR	Pre-Admission Screening and Resident Review
PATH	People's Access to Help
PBM	Pharmacy Benefits Management
PCI	Payment Card Industry
PCM	Portfolio Coordination and Management
PEA	Provider Enrollment Application
PEIA	Public Employee's Insurance Agency
PEO	Professional Employer's Organization
PERM	Payment Error Rate Measurement
PHAB	Public Health Accreditation Board
PHE	Public Health Emergency
PM	Project Management
PMO	Product Management Office
PMP	Project Management Plan
POC	Proof of concept
POS	Point-of-sale
PPMS	Physician Performance Measurement System
PSTG	Private Sector Technology Group
QA	Quality Assurance
QC	Quality check
QMS	Quality Management Services
RAC	Recovery Audit Contractor
RAI	Resident Assessment Instrument
RFI	Request for information
RFP	Request for Proposal
RFQ	Request for Quotation
RIMS	Revenue Information System
SAIF	State Accident Insurance Fund

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Acronym/Abbreviation	Definition
SAO	State Auditor's Office
SAS	Scripting, Dagster, AWS, Snowflake, SQL
SDLC	System Development Life Cycle
SIS	Supports Intensity Scale
SIT	System integration testing
SMC	Streamlined Modular Certification
SME	Subject matter expert
SMUD	Sacramento Municipal Utility District
SNAP	Supplemental Nutrition Assistance Program
SOC	Systems of Care
SOP	Standard operating procedures
SOS	Secretary of State
SOW	Scope of work
SPA	State Plan Amendment
SPM	Software Project Management
SPRS	State Plan Review and Support
SSA	State Self-Assessment
SSDDMS	Shared School District Data Management System
SSIS	SQL Server Integration Services
State	West Virginia
SUD	Substance Use Disorder
SWA	Solid Waste Authority
SWOT	Strengths, weaknesses, opportunities, and threats
TA	Technical Assistance
TAG	Technical assistance groups
TANF	Temporary Assistance for Needy Families
TAPS	Technical Assistance and Program Support Project
TEPMS	Technical Information and Enterprise Project Management Services
TFL	TRICARE for Life
TIA	Technology Innovation Administration
TMSIS	Transformed Medicaid Statistical Information System
TPL	Third-party liability
UAT	User acceptance testing
UI	Unemployment Insurance

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Acronym/Abbreviation	Definition
USVI	United States Virgin Islands
VHCURES	Vermont Health Care Uniform Reporting and Evaluation System
VP	Vice President
WC	Workers' Compensation
WSLCB	Washington State Liquor and Cannabis Board
WV	West Virginia
WVCHIP	West Virginia Children's Health Insurance Program
WVU	West Virginia University

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

Alex J.Mayer
Cabinet Secretary

Cynthia Beane, MSW, LCSW
Commissioner

DATE: June 3, 2025

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

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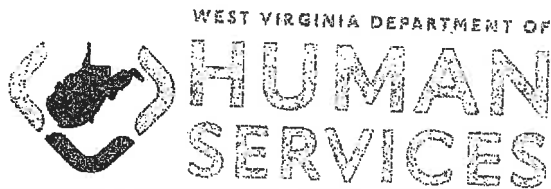   Office of Shared Administration/Purchasing

RE: PF1712916, CDO BMS25*42
          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 Child Welfare Initiatives Project Management Services Phase VI. The service period 06/15/2025-06/14/2026. The total estimated cost is $3,937,280.00.

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

Alex J. Mayer
Cabinet Secretary

Cynthia Beane, MSW, LCSW
Commissioner

Date: June 3, 2025

To: Office Shared Administration/Finance

From: Jimmy Dowden, WVPBC
Director
BMS, Procurement Services

Re: PF1712916, CDO BMS25*42
Dept 0511

The West Virginia Bureau for Medical Services (BMS) is submitting this funding memo related to the above-referenced delivery order. BMS anticipates making payments for Month 1-11 is SFY26 and Month 12-13 in SFY27, per the table below:

CDO BMS25*42
Child Welfare Initiatives
Project Management
Services Phase VI

06/15/2025-04/30/2026	Payment	05/01/2026-06/14/2026	Payment
PR05-2026 Lead Project Manager hours @ $215	$316,265.00	PR07 – 2027 Lead Project Manager hours @ $215	$45,365.00
Engagement Manager hours @ $270	$42,120.00	Engagement Manager hours @ $270	$5,130.00
Lead MMIS Project Manager 20 hours @ $205	N/A	Lead MMIS Project Manager 4 hours @ $205	N/A
General Project Manager hours @ $190	$2,633,970.00	General Project Manager hours @ $190	$383,990.00
Project Management Support Staff hours @ $80	$447,080.00	Project Management Support Staff hours @ $80	$63,360.00
	$3,439,435.00		$497,845.00
		Grand Total:	$3,937,280.00

Page 2

Please feel free to contact me if additional documentation or details are needed. I can be reached at 304-352-4286 or jimmy.k.dowden@wv.gov. Thank you for your time and consideration in the 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 offi

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 hav today.

Bryan

Filter By

Keyword Search

For more information on how to use our keyword search, visit our help guide

Simple Search	Search Editor

◯ Any Words ⓘ

◯ All Words ⓘ

◯ Exact Phrase ⓘ

e.g. 123456789, Smith Corp

"BERRY DUNN MCNEIL & PARKER LLC" ✕

Entity ⌄

Location ⌄

Status ⌃

☑ Active

☐ Inactive

Reset ↻

(Entity Information ⌃) ‹ (All Entity Information) (Entities) (Disaster Response Registry) (Responsibility / Qu) ›

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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

Business Purpose	5511 - Management of Companies and Enterprises - Management of Companies and Enterprises - Management of Companies and Enterprises Including Offices of Bank Holding Companies and Other Holding Companies	**Capital Stock**	
Charter County	Kanawha	**Control Number**	0
Charter State	ME	**Excess Acres**	
At Will Term	A	**Member Managed**	MBR
At Will Term Years		**Par Value**	
Authorized Shares		**Young Entrepreneur**	Not Specified

Addresses

Type	Address
Designated Office Address	209 WEST WASHINGTON STREET CHARLESTON, WV, 25302
Mailing Address	2211 CONGRESS STREET PORTLAND, ME, 04102 USA
Notice of Process Address	URA SERVICES, INC. 5098 WASHINGTON STREET W. SUITE 407 CHARLESTON, WV, 25313
Principal Office Address	2211 CONGRESS STREET PORTLAND, ME, 04102 USA
Type	Address

Officers

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

DBA

DBA Name	Description	Effective Date	Termination Date
BERRY DUNN	TRADENAME	3/21/2011	
BERRY, DUNN, MCNEIL & PARKER, PLLC	TRADENAME	11/5/2019	

DBA Name	Description	Effective Date	Termination Date

Annual Reports
Filed For
2025
2024
2023
2022
2021
2020
2019
2018
2017
2016
2015
2014
2013
2012
2011
2010
2009
Date filed

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

Wednesday, June 11, 2025 — 8:07 AM

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