



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

## State of West Virginia Delivery Order

Order Date: 06-05-2025

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 BMS2500000047 1	Change Order No:	Procurement Folder:	1714155
Document Name:	Partnership Management Project Phase III		Reason for Modification:	
Document Description:	Partnership Management Project Phase III			
Procurement Type:	Central Delivery Order			
Buyer Name:	Crystal G Hustead			
Telephone:	(304) 558-2402			
Email:	crystal.g.hustead@wv.gov			
Shipping Method:	Best Way		Master Agreement Number: CMA 0511 HHR2100000003 1	
Free on Board:	FOB Dest, Freight Prepaid			

VENDOR	DEPARTMENT CONTACT																				
Vendor Customer Code: 000000100150 BERRY DUNN MCNEIL & PARKER LLC 2211 CONGRESS ST  PORTLAND ME 04102 US Vendor Contact Phone: 6813138905 Extension: Discount Details: <table><thead><tr><th></th><th>Discount Allowed</th><th>Discount Percentage</th><th>Discount Days</th></tr></thead><tbody><tr><td>#1</td><td>No</td><td>0.0000</td><td>0</td></tr><tr><td>#2</td><td>No</td><td></td><td></td></tr><tr><td>#3</td><td>No</td><td></td><td></td></tr><tr><td>#4</td><td>No</td><td></td><td></td></tr></tbody></table>		Discount Allowed	Discount Percentage	Discount Days	#1	No	0.0000	0	#2	No			#3	No			#4	No			Requestor Name: Kelly (Jimmy) Dowden Requestor Phone: (304) 356-4861 Requestor Email: jimmy.k.dowden@wv.gov  <b>2025</b> FILE LOCATION _____
	Discount Allowed	Discount Percentage	Discount Days																		
#1	No	0.0000	0																		
#2	No																				
#3	No																				
#4	No																				

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

Total Order Amount: \$872,580.00

Purchasing Division's File Copy

PURCHASING DIVISION AUTHORIZATION

DATE: 6/11/25  
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION

DATE: 6/11/25  
ELECTRONIC SIGNATURE ON FILE



**Extended Description:**

Partnership Management Project Phase III

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

Total: \$872,580.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$21,500.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2025-06-15	2026-06-14				

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

Lead Project Manager: Optional Renewal Year Two

Hourly Rate: \$215.00

100 hours \$ \$215=\$21,500.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$64,800.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2025-06-15	2026-06-14				

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

Engagement Manager: Optional Year Two

Hourly Rate: \$270.00

240 hours @ \$270=\$64,800.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$613,320.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2025-06-15	2026-06-14				

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

General Project Manager: Optional Renewal Year Two

Hourly Rate: \$190.00

3,228 hours @ \$190=\$613,320.00





Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$172,960.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2025-06-15	2026-06-14				

**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

2,162 hours @ \$80=\$172,960.00



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# West Virginia Department of Human Services (DoHS), Bureau for Medical Services (BMS)

## Partnership Management Project Phase III

### Staffing Plan and Scope of Work

Prepared for Centralized Master Agreement HHR 21\*03



#### Submitted by:

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

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#### Submitted On:

May 23, 2025



## **Staffing Plan and Scope of Work for the West Virginia Department of Human Services, Bureau for Medical Services Partnership Management Phase III**

This scope of work (SOW) describes the tasks Berry, Dunn, McNeil & Parker, LLC (BerryDunn) will perform to assist the West Virginia (State, WV) Department of Human Services (DoHS) Bureau for Medical Services (BMS) in leverage and reuse initiatives. The work completed under the Partnership Management Phase III project will be completed in accordance with the terms and conditions of the Centralized Master Agreement (CMA) HHR 21\*03 BMS Project Management Services contract between Berry, Dunn, McNeil & Parker, LLC and WV 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 information in preparing this SOW.

#### **1.1 Key Information**

The objective of this project is to continue to support BMS by incorporating State leverage and reuse activities into other states' and territories' Medicaid agencies through the following activities:

- Assisting in the facilitation of multistate forums
- Supporting technical advisory activities
- Offering Medicaid program management guidance
- Supporting BMS in efforts related to the sharing of systems, modules, code, contracts, and developed artifacts

The Partnership Management project evolved from the Provider Management Support project, which ran for three phases. The WV DoHS is committed to the leverage and reuse of Medicaid technologies and systems with other state Medicaid agencies (SMAs). Leverage and reuse activities allow the Centers for Medicare & Medicaid Services (CMS) and the SMA to share Medicaid Enterprise System (MES) information technology resources effectively and more efficiently.

The Partnership Management Phase III Project will also help the State meet its identified Medicaid Information Technology Architecture (MITA)-specific goals, such as:

- Improve BMS effectiveness and efficiency
- Leverage technology to enhance performance and decision-making
- Help ensure program quality
- Improve operational efficiency and reduce costs in the healthcare system
- Improve access to information necessary for Operations Management



- Improve effectiveness and efficiency of the Performance Management function

## 1.2 Assumptions

Estimates for this SOW are based on the following assumptions:

- The State leadership team will consist of Sarah Young, Deputy Commissioner, as project sponsor, and Brandon Lewis, Director Office of Enterprise Systems, as project lead.
- The State project lead will provide timely decision-making and responses to information requests from the BerryDunn project team.
- The BerryDunn leadership team will consist of Nicole Becnel as the Engagement Manager (EM), Emily McCoy as the Lead Project Manager (LPM), and Amber Davis as the Project Manager (PM).
- This work will begin upon approval of this SOW and at 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 BMS project sponsor.
- Deliverables will be provided in an agreed-upon format.
- The estimated number of hours for leverage and reuse initiatives includes assistance for up to two State partnerships.

## 1.3 Project Funding

The State intends to utilize the Medicaid Management Information System (MMIS) Implementation Advance Planning Document Update (IAPD-U) for this SOW. CMS previously approved the MMIS IAPD-U on November 22, 2024, for total State and federal funds in the amount of \$31,052,928, under project identifier WV-2024-10-01-MMIS-IAPDU-MITA. The estimated cost of the services delivered under this SOW is \$872,580 (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-U to allocate additional funds for project management. This project supports leverage and reuse initiatives that are eligible for Federal Financial Participation in accordance with the State Medicaid Director Letter 16-004, which states that solutions are required to promote sharing, leverage, and reuse of Medicaid technologies.

## 2.0 Project Scope and Staffing Plan

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



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

Ref	Deliverable/Service Approach and Acceptance Criteria	Responsible	Hours Estimate
1.0	<p><b>Engagement Oversight</b></p> <p><i>Service Approach</i></p> <p>BerryDunn's leadership team will oversee and coordinate BerryDunn staff, services, and deliverables. BerryDunn's project leadership will regularly meet with the BerryDunn project lead and other key team members to discuss project status and issues impacting the timely completion of project work, and oversee BerryDunn staff, services, and deliverable review.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> <li>• D01: Commissioner Briefing</li> </ul> <p><i>Completion Criteria</i></p> <p>All parties will deem Engagement Oversight complete upon completion of the project closeout meeting and acceptance of the final monthly status report (MSR) by the project sponsor or their designee.</p>	<p>Nicole Becnel Emily McCoy Amber Davis</p>	180
2.0	<p><b>Project Execution and Control</b></p> <p><i>Service Approach</i></p> <p>Upon project initiation, BerryDunn will host a project kickoff meeting. In support of Project Execution and Control, BerryDunn's leadership will regularly meet with the project sponsor to discuss project status and issues affecting the timely completion of work, and will oversee BerryDunn staff, services, and deliverables. Project Execution and Control will also include:</p> <ul style="list-style-type: none"> <li>• Facilitating meetings, preparing meeting materials, and taking notes for BerryDunn- and State-owned meetings</li> <li>• Preparing monthly project status updates, risks, issues, and briefings for the State leadership team</li> <li>• Managing project logs (action item, decision, issue, and risk tracking)</li> <li>• Storing project documentation in an agreed-upon SharePoint repository</li> <li>• Facilitating a Project Closeout Meeting prior to the end of the project</li> <li>• Reporting the project closeout activities in</li> </ul>	<p>Nicole Becnel Emily McCoy Amber Davis Andrea Richardson Chris Fanikos Danielle Pelletier Darrah Ruiz Dawn Webb Ebony Carter Ethan Wiley Jason Hargrove Jeffrey Stoddard Joy Prenger Katie Gray Katie McDonald Lauren McTear Bill Richardson Nolan Cyr Sarah Renner Shardae Bunche</p>	3,225



Ref	Deliverable/Service Approach and Acceptance Criteria	Responsible	Hours Estimate
	<p>the final MSR</p> <p>Deliverable(s)</p> <ul style="list-style-type: none"> <li>D02: Monthly Status Report</li> </ul> <p><i>Completion Criteria</i></p> <p>All parties will deem Project Execution and Control complete upon completion of the project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.</p>	<p>Emily Richards</p> <p>Yoko McCarthy</p> <p>Renee Gayhart</p> <p>Maggie Anderson</p> <p>Shea Berry-Brennan</p> <p>Hope Connard</p> <p>Andrew Oliver</p> <p>April Adames</p> <p>Rebecca Moore</p> <p>John Bermudez</p> <p>Kohnyr Smith</p> <p>Laura Perez</p> <p>Megan Blount</p> <p>Skye Kwong</p> <p>Hailey Holden</p> <p>Cate Poling</p> <p>Kourtney Kirk</p> <p>Shandia Benke</p> <p>Samuel Kessler</p> <p>Alycia Minshall</p> <p>Caitlin Cabral</p> <p>Grace Min</p> <p>Megan Hamilton</p> <p>Jonathan Williams</p> <p>Jordan Ramsey</p> <p>KD Dobyne</p> <p>Carole Ann Guay</p> <p>Sofia Guerrero</p>	
3.0	<p><b>Leverage and Reuse</b></p> <p><i>Service Approach</i></p> <p>BerryDunn will provide resources with relevant expertise to assist BMS with facilitating, planning, and designing up to two State partnerships and initial support for additional partnerships. BerryDunn will continue updating the Leverage and Reuse Opportunities Repository, as requested.</p> <p><i>Completion Criteria</i></p>	<p>Nicole Becnel</p> <p>Emily McCoy</p> <p>Amber Davis</p> <p>Andrea Richardson</p> <p>Chris Fanikos</p> <p>Danielle Pelletier</p> <p>Darrah Ruiz</p> <p>Dawn Webb</p>	1,000





Ref	Deliverable/Service Approach and Acceptance Criteria	Responsible	Hours Estimate
	All parties will deem Leverage and Reuse complete upon completion of the project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.	Ebony Carter Ethan Wiley Jason Hargrove Jeffrey Stoddard Joy Prenger Katie Gray Katie McDonald Lauren McTear Bill Richardson Nolan Cyr Sarah Renner Shardae Bunche Emily Richards Yoko McCarthy Renee Gayhart Maggie Anderson Shea Berry-Brennan Hope Connard Andrew Oliver April Adames Rebecca Moore John Bermudez Kohnyr Smith Laura Perez Megan Blount Skye Kwong Hailey Holden Cate Poling Kourtney Kirk Shandia Benke Samuel Kessler Alycia Minshall Caitlin Cabral Grace Min Megan Hamilton Jonathan Williams	



Ref	Deliverable/Service Approach and Acceptance Criteria	Responsible	Hours Estimate
		Jordan Ramsey KD Dobyne Carole Ann Guay Sofia Guerrero	
4.0	<p><b>APD Support</b></p> <p><i>Service Approach</i></p> <p>BerryDunn will develop and assist in facilitating the approval of APDs to help ensure the project continues to maintain buy-in and financial backing from relevant federal partners.</p> <p><i>Deliverable</i></p> <ul style="list-style-type: none"> <li>D03: APD (As Needed)</li> <li>D04: APD Updates (As Needed)</li> </ul> <p><i>Completion Criteria</i></p> <p>All parties will deem APD Support complete upon completion of the project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.</p>	<p>Nicole Becnel Amber Davis Katie McDonald Darrah Ruiz Nolan Cyr Kohnyr Smith</p>	325
5.0	<p><b>Sub-Project Management Services</b></p> <p><i>Service Approach</i></p> <p>BerryDunn will leverage engagement processes and work with the BMS project sponsor and leads to define a process by which Partnership Management sub-projects can be defined and initiated. The process for requesting and approving these sub-projects will include a review and approval process by the project sponsor and/or key BMS stakeholder(s).</p> <p>BerryDunn will conduct high-level requirements analysis and project strategic planning for BMS-identified initiatives.</p> <p>BerryDunn may also assist with other limited tasks related to the implementation of BMS projects, as defined by the project sponsor(s). BerryDunn assumes the initiation of up to three projects.</p> <p><i>Completion Criteria</i></p> <p>All parties will deem Sub-Project Management Services complete upon completion of the project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.</p>	<p>Nicole Becnel Emily McCoy Amber Davis Andrea Richardson Chris Fanikos Danielle Pelletier Darrah Ruiz Dawn Webb Ebony Carter Ethan Wiley Jason Hargrove Jeffrey Stoddard Joy Prenger Katie Gray Katie McDonald Lauren McTear Bill Richardson Nolan Cyr Sarah Renner Shardae Bunche</p>	1,000



Ref	Deliverable/Service Approach and Acceptance Criteria	Responsible	Hours Estimate
		Emily Richards Yoko McCarthy Renee Gayhart Maggie Anderson Shea Berry-Brennan Hope Connard Andrew Oliver April Adames Rebecca Moore John Bermudez Kohnyr Smith Laura Perez Megan Blount Skye Kwong Hailey Holden Cate Poling Kourtney Kirk Shandia Benke Samuel Kessler Alycia Minshall Caitlin Cabral Grace Min Megan Hamilton Jonathan Williams Jordan Ramsey KD Dobyne Carole Ann Guay Sofia Guerrero	
Total Hours			5,730
Total Not-to-Exceed Cost Estimate			\$872,580



### 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:

- CL 15: Engagement Manager (EM) (\$270/hour)
- CL 14: Lead Project Manager (LPM) (\$215/hour)
- CL 17: General Project Manager (GPM) (\$190/hour)
- CL 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	Nicole Becnel	240	\$64,800
14	LPM	\$215	Emily McCoy	100	\$21,500
17	GPM	\$190	Amber Davis	600	\$114,000
17	GPM	\$190	Andrea Richardson	26	\$4,940
17	GPM	\$190	Chris Fanikos	100	\$19,000
17	GPM	\$190	Danielle Pelletier	200	\$38,000
17	GPM	\$190	Darrah Ruiz	100	\$19,000
17	GPM	\$190	Dawn Webb	26	\$4,940
17	GPM	\$190	Ebony Carter	100	\$19,000
17	GPM	\$190	Ethan Wiley	146	\$27,740
17	GPM	\$190	Jason Hargrove	100	\$19,000
17	GPM	\$190	Jeffrey Stoddard	200	\$38,000
17	GPM	\$190	Joy Prenger	100	\$19,000
17	GPM	\$190	Katie Gray	250	\$47,500
17	GPM	\$190	Katie McDonald	315	\$59,850
17	GPM	\$190	Lauren McTear	100	\$19,000
17	GPM	\$190	Bill Richardson	100	\$19,000
17	GPM	\$190	Nolan Cyr	39	\$7,410
17	GPM	\$190	Sarah Renner	26	\$4,940
17	GPM	\$190	Shardae Bunche	200	\$38,000



CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
17	GPM	\$190	Emily Richards	174	\$33,060
17	GPM	\$190	Yoko McCarthy	200	\$38,000
17	GPM	\$190	Renee Gayhart	100	\$19,000
17	GPM	\$190	Maggie Anderson	13	\$2,470
17	GPM	\$190	Shea Berry-Brennan	13	\$2,470
18	SS	\$80	Hope Connard	26	\$2,080
18	SS	\$80	Andrew Oliver	225	\$18,000
18	SS	\$80	April Adames	250	\$20,000
18	SS	\$80	Rebecca Moore	250	\$20,000
18	SS	\$80	John Bermudez	200	\$16,000
18	SS	\$80	Kohnyr Smith	100	\$8,000
18	SS	\$80	Laura Perez	237	\$18,960
18	SS	\$80	Megan Blount	26	\$2,080
18	SS	\$80	Skye Kwong	250	\$20,000
18	SS	\$80	Hailey Holden	65	\$5,200
18	SS	\$80	Cate Poling	26	\$2,080
18	SS	\$80	Kourtney Kirk	26	\$2,080
18	SS	\$80	Shandia Benke	26	\$2,080
18	SS	\$80	Samuel Kessler	26	\$2,080
18	SS	\$80	Alycia Minshall	52	\$4,160
18	SS	\$80	Caitlin Cabral	52	\$4,160
18	SS	\$80	Grace Min	52	\$4,160
18	SS	\$80	Megan Hamilton	52	\$4,160
18	SS	\$80	Jonathan Williams	52	\$4,160
18	SS	\$80	Jordan Ramsey	52	\$4,160
18	SS	\$80	KD Dobyne	52	\$4,160
18	SS	\$80	Carole Ann Guay	52	\$4,160
18	SS	\$80	Sofia Guerrero	13	\$1,040
<b>Total</b>				<b>5,730</b>	<b>\$872,580</b>



## 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	19	8	275	183	485	\$73,740
Month 2	19	8	250	167	444	\$67,710
Month 3	19	8	250	166	443	\$67,630
Month 4	19	8	248	166	441	\$67,250
Month 5	19	8	248	166	441	\$67,250
Month 6	19	8	248	166	441	\$67,250
Month 7	18	8	248	166	440	\$66,980
Month 8	18	8	248	166	440	\$66,980
Month 9	18	8	249	166	441	\$67,170
Month 10	18	7	241	165	431	\$65,355
Month 11	18	7	241	165	431	\$65,355
Month 12	18	7	241	165	431	\$65,355
Month 13	18	7	241	155	421	\$64,555
Total	240	100	3,228	2,162	5,730	\$872,580



# 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 Execution and Control													
3.0 Leverage and Reuse													
4.0 APD Support													
5.0 Sub-Project Management Services													



**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*  
30AAA44AD63A477

Signature

5/23/2025

Date

**BMS Approval of Approach, Staffing, and Not-to-Exceed Cost**

*Brian L. Lane*

Signature

*6/5/25*

Date





## Appendix A: Resumes



### Nicole Becnel, PMP®, ECCP

PRINCIPAL

Berry, Dunn, McNeil & Parker, LLC

#### EDUCATION AND CERTIFICATIONS

BA, Speech and Hearing Science, University of South Florida

Certified Project Management Professional® (PMP®)  
Executive Coaching Certification®

#### PROPOSED PROJECT ROLE

Engagement Manager

#### MEDICAID EXPERIENCE

23.5 years

Nicole Becnel has steered a career track for more than 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 among people, data, technology, and business strategy. This unique strength has enabled a different and fresh perspective in building and leading a Medicaid practice—reaching beyond the traditional role to help clients deliver transformations in their health and human services (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, which she championed to initiate a multistate 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 West Virginia project management (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 more than 100 short- and long-term projects delivered on time and within budget
- Led the project team that supported the State to secure more than \$750 million federal dollars for West Virginia's transformation initiatives for its state programs.



- Private Sector Technology Group (PSTG) Past Vice-Chair
- Led the WV PM team, who became one of the first in the nation to help the State successfully implement a Medicaid Management Information System (MMIS) solution in accordance with the project's schedule and budgets, without issuing advanced payments to providers

## 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)*
- *Managed Care Organization (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 Disturbance (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 (WV) 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)*
- *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 DoH's programs, including Medicaid, CHIP, Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. 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.

*EVV Solution Implementation Project (03/2018 to 06/2023)*

Nicole led the project team implementing the overall EVV solution. Her work included strategic planning, organizational change management, requirement development, 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 User Acceptance Testing (UAT) planning and support.

*Provider Management Support (07/2019 to 01/2021)*

Nicole served as the Lead Project Manager assisting WV with its leverage and reuse initiatives demonstrating the Leverage Condition established by Centers for Medicare & Medicaid Services (CMS) in the MITA Seven Standards and Conditions. The team also supported WV Medicaid leadership to execute a multistate 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 thorough 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 public health emergency. She supported the DoHS Commissioners and the Secretary to help ensure the State had the support they needed to address COVID-19 and the response to its aftermath. She oversaw the procurement and implementation of a contact tracing and disease investigation software system, the procurement of federal funding for epidemiological activities and testing and staffing and organizational development activities for DoHS and Bureau for Public Health (BPH). The software helped the State coordinate its contact tracing initiatives and use of the contact tracing platform across a workforce of DoHS volunteers, the National Guard, WV University staff, and State local health departments. The outcome of the project was the successful statewide launch of the new contact tracing and disease investigation software and the procurement of \$37 million in federal relief funding for public health initiatives related to COVID-19.

*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 thorough 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)*

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

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

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

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

Nicole served as the project manager to assist the State with the development of procurement documentation for the DW/DSS re-procurement. In this role, Nicole was responsible for managing



the project team, serving as liaison with the Bureau, reviewing project deliverables, and providing subject matter knowledge and support.

**– New Jersey Division of Medical Assistance and Health Services (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 budget, time, and quality specifications to help assure client requirements across the Medicaid Enterprise. In her role, Nicole successfully project managed the on time delivery of the NPI initiative in an accelerated time frame, successfully provided on-site support to BMS during the CMS certification evaluation, facilitated best-practice cross communication, and met customer expectations by monitoring, evaluating, and assigning corrective actions.

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

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

**– Project Management Support**

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

**PRESENTATIONS**

- "Modularity GPS: Defining the Road map and Understanding the Landscape," Presentation for MESC 2016, Co-presented with Lisa Alger (CSG Government Solutions) and Andrea Danes (CSG Government Solutions), 08/16/2016
- "Managing in a Modular MMIS Implementation," Presentation for MESC 2014, 08/21/2014



## Emily E. McCoy, RN, BSN, PMP®

SENIOR MANAGER

Berry, Dunn, McNeil & Parker, LLC

### EDUCATION AND CERTIFICATIONS

BS, Nursing, Marshall University

Registered Nurse

Certified Project Management

Professional® (PMP®)

Executive Coaching Certification

### PROPOSED PROJECT ROLE

Lead Project Manager

### MEDICAID EXPERIENCE

22 years

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

### KEY QUALIFICATIONS

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



- More than 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.
- Served on the Outcomes-Based State Self-Assessment (SSA) Workgroup through the Private Sector Technology Group (PSTG)

## PROJECT EXPERIENCE

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

Emily serves as a senior manager in BerryDunn's Medicaid Practice Group, 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)*
- *Advance Planning Document (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 (CCBHC) State Plan Amendment (SPA) Phase III (06/2024 to present)*
- *1915(c) Children with Serious Emotional Disturbance (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)*
- *Mental Health Parity 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, organizational change management (OCM), and certification and compliance. Emily was able to combine her experience and knowledge of State policy and system implementations with this unique opportunity to integrate three separate systems to improve service delivery to State citizens.

*Public Health Emergency (PHE) 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 Implementation Team Office (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**

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

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

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

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

- Interpreting regulatory policy to determine possible impacts to the MMIS and other systems
- Monitoring system performance against Medicaid policies and federal regulations for compliance and reimbursement
- Oversight and management of multiple federal regulations within the MMIS, such as 5010/D.O, ICD-10, MITA, and Transformed Medicaid Statistical Information System (T-MSIS)
- 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.



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– **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 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.

**Amber Davis, Prosci® CCP**

# BerryDunn



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

**EDUCATION AND CERTIFICATIONS**

BA, Criminology, Indiana University of Pennsylvania  
Non-profit Management Certification, Butler County Community College  
Incident Management Certified Investigator (CI), Pennsylvania, Office of Developmental Programming  
Certified Community Health Worker (CCHW), Pennsylvania Certification Board  
Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT + MCMP II)  
Prosci® Certified Change Practitioner  
Licensed Real Estate Agent, Pennsylvania Department of State, Real Estate Commission

**PROPOSED PROJECT ROLE**

General Project Manager

**MEDICAID EXPERIENCE**

14 years

Amber Davis is an experienced senior director and Medicaid health and human services (HHS) subject matter expert (SME) with a proven history of promoting positive and successful business processes and relationships, leading to successful project outcomes. Amber has deep familiarity working alongside single state Medicaid agencies, having supported the delivery of impactful solutions that support mission-driven initiatives for over a decade. Amber’s knowledge and dedication are reflected in her commitment to promote leadership through motivation and intention, and she focuses on building sustainable and strong relationships with states, vendors, and providers across the HHS realm to achieve organizational growth and strategic engagement. She specializes in quality assurance, utilization review, compliance, conflict resolution, effective management, public speaking, innovation, and government relations.

**KEY QUALIFICATIONS**

- 10+ years of experience in quality assurance, utilization review, and compliance, particularly as relates to Medicaid programming and funding needs, such as drafting of APD and deliverables
- Well versed in operations, service expansion, cross-department collaboration, and change management
- Strong focus and 10+ years of experience in relationship building and partnership management

**PROJECT EXPERIENCE**

**BerryDunn (09/2022 to present)**  
– **United States Virgin Islands (USVI) Department of Human Services Enterprise Portfolio Management Office (EPfMO) Project (09/2024 to present)**  
Amber serves as the engagement manager supporting the USVI’s Medicaid agency, the Department of Human Services. Amber is responsible for leading client engagements, managing project deliverables, and helping to ensure alignment with territory and federal Medicaid regulations. She oversees interested and invested party communications, coordinates cross-functional teams, and provides strategic guidance to improve program efficiency and compliance. Amber analyzes policy changes, assesses program performance, and develops data driven recommendations to enhance service delivery. In addition, she facilitates workshops, conducts risk

assessments, and implements best practices to optimize Medicaid operations. Amber serves as a



primary point of contact for the client, helping to ensure timely resolution of issues and foster strong relationships to drive successful project outcomes.

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

*EPfMO Project (09/2024 to present)*

Amber serves as a project manager supporting the Guam's Medicaid agency, the Department of Public Health and Social Services. Amber oversees the planning of the 2025 Medicaid Enterprise Territory Summit (METS) and the development of APDs for the Centers for Medicare & Medicaid Services (CMS). She is responsible for orchestrating phases of project planning and execution. Amber develops detailed project plans outlining tasks and timelines, helping to ensure adherence to federal regulations governing the APD process. She coordinates cross-functional teams and facilitates effective communication among interested and invested parties to help ensure timely completion of project milestones. Amber also manages the creation and submission of the APDs, helping to ensure compliance with CMS requirements to support securing necessary approvals.

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

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

Amber provides project management support for the partnership management work provided between West Virginia and partnering states and territories. Amber facilitates team meetings internally and externally, manages project budgets, provides support with vendor meetings, vendor change request needs and scope of work approvals, project resources to help ensure leverage and reuse items are completed timely, and is a liaison between the partnering states and territories. She also facilitates the monthly Multistate Forum and manages the participants communication between sessions.

*APD Assistance (05/2023 to 12/2024)*

Amber served as the project manager for the advance planning document consulting project. In this role, Amber tracked the progress and development of multiple APD documents and the submissions to CMS, in support of funding for new and ongoing projects. She communicated with the State, reviewed documents, facilitated team meetings internally and externally, managed budgets, timelines, change request needs, and project resources to help ensure the project remained compliant with contract deliverables.

*Provider Enrollment Application (PEA) Project and Provider Management Support (09/2022 to 10/2023)*

Amber provided project management support for the provider enrollment partnership between West Virginia and USVI. She also worked on leverage and reuse initiatives.

*Electronic Visit Verification (EVV) Solution Implementation Project (09/2022 to 06/2023)*

As the project manager, Amber was responsible for managing project deliverables, and working closely with the client to help ensure contract requirements and expectations were fully met.

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

*Provider Management Module (08/2023 to present)*

Amber is providing specialized knowledge and expertise to New Jersey's single state Medicaid agency, DMAHS, relating to provider enrollment. She is supporting the Provider Modernization business process mapping (BPM) and created a project tracking document to highlight areas of focus, regulation references, and workstream.

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



*Medicaid Recovery Audit Contractor (RAC) Program Evaluation (08/2023 to present)*

Amber serves as a Medicaid project SME providing research assistance to evaluate the design and operation of the RAC program for compliance with applicable federal requirements. She has focused on the differentiation of the Colorado RAC programs and policies in comparison to 16 other state plans. Amber has attended several meetings with State RAC program administrators to identify program specific features.

**Centene Corporation, PA Health&Wellness (10/2021 to 08/2022)**

As a manager of provider relations within Centene, an organization contracted with Department of Human Services (DHS), Pennsylvania's single state Medicaid agency, to help provide access to high-quality healthcare, innovative programs and health solutions, Amber led the Long-Term Supports and Services (LTSS) provider relations team, covering the Pennsylvania territory. She was responsible for maintaining production and quality standards, external relationships, developing new provider relationships, assisting with contracting activities and was a SME on the CommunityHealth Choices model. Amber would also monitor activities with providers and team members such as provider on-site visits, credentialing, and orientations.

**Alliance for Non-profit Resources (ANR) (10/2012 to 10/2021)**

Amber held multiple positions within ANR, an agency contracted with DHS, Pennsylvania's single state Medicaid agency, to help provide administrative and organizational support, including for distribution oversight of Medicaid/transportation funding, reporting, quality assurance, and programming. In her roles, she provided critical management support of \$24M in Medicaid funding, including Agency with Choice Waiver programming, EVV implementation, transportation, food bank, hospital food security programming, and service development funding. In her roles with ANR, Amber refined her relationship building expertise, as well as developed strong skills in quality assurance and utilization review and compliance. Additionally, she honed engagement management skills and was entrusted with new onboarding as well as annual regulatory training.

**– Senior Director of Operations and Service Development (09/2017 to 10/2021)**

Amber led \$9.2 million dollars of Medicaid programming and 325+ team members throughout Pennsylvania. She successfully implemented statewide expansion, adding seven regions to daily operations, established \$2.5 million dollars of organizational growth from brokers, schools, managed care organizations, administrative entities, commercial, and non-profit businesses, and instilled trust in clients by providing them with transparent communications. She enforced quality assurance and contract obligations as well as acted as an informal publicist to highlight team's best qualities, represented ANR during consultations, State, and county level, and served as a solutions engineer.

**– Director of Operations (06/2015 to 09/2017)**

Amber spearheaded general operations in collaboration with the Board, other executives, and staff, while launching the development of regional expansion planning. She shaped relationships and managed agreements with external partners and evaluated and transformed the efficiency of business procedures according to organizational objectives.

**– Senior Operations Manager (11/2013 to 06/2015)**

Amber established and carried out departmental/organizational goals, developed programs, policies, and procedures, and oversaw fiscal and budgetary activities.

**– Operations Manager (10/2012 to 11/2013)**

Amber analyzed and improved departmental processes, monitored daily operations, quality, productivity and efficiencies, and developed program training standards.





## Andrea Richardson, Prosci® CCP, LSSGB

MANAGER

Berry, Dunn, McNeil & Parker, LLC



### 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

3

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.

### 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 Bureau for Social Services (BSS)

##### *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 children and their 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 HB4975.

##### *RFP Development (06/2024 to present)*

Andrea is serving as a child welfare SME to support the development of an RFP to procure a communication system that will aid BSS caseworkers and interested parties who support children and families involved in the child welfare system. As a SME, Andrea is leading the development of system requirements, creating the RFP, and collaborating with DoHS and BSS leadership as they develop a





vision for the system that meets WV HB4975 requirements.

*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 is serving as a child welfare and crisis services SME to support West Virginia by improving the use of the CCRL and CMCRS services statewide. Andrea works with the State to identify gap areas and to 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 request for information (RFI) and the gathering of requirements, and supports the procurement process to secure a new child care system for IA HHS. She manages the budget, creation, and delivery of project deliverables, resource allocation, and client expectations.

*Comprehensive Child Welfare Information System (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 delivery of project deliverables, resource allocation, and client expectations.

**– Kentucky Department of Community-Based Services, Adult Protection 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 Department of



Human Services (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.

– **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)*

Andrea is serving as engagement manager on this project facilitating department 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 is providing guidance to CFSD leadership on the necessary steps for a successful federal review and procurement process. Andrea manages the project deliverables, budget, resource allocation, client expectations, and project tasks.

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

*Department of Justice (DOJ) Agreement Implementation Plan (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 subject matter expert.

– **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.

– **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 to support the development of a State Plan on Aging. Andrea was a lead facilitator for the development of the State Plan on 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 Supports Intensity Scale (SIS) Assessments for people seeking services through the Office of Developmental Programs. She identified and determined the level of needs based on meeting feedback in conjunction with an assessment tool, facilitated meetings with families and people with varied abilities to help ensure that the correct ratings were reported, and reported on assessment results and findings.

**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-Profit*, 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 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 Administration for Children and Families (ACF) Systems of Care (SOC) demonstration grant across the Commonwealth in the form of technical assistance, local and federal reporting, and coordination of networking opportunities for child welfare programs. She also served as project manager for the statewide Family Center, Promoting Responsible Fatherhood, and Time Limited Reunification Grants federally funded through Community-Based Child Abuse Prevention and IV-B dollars. She facilitated statewide and local workgroups comprised of HHS system partners (e.g., Department of Human Services, including the state Medicaid agency, Office of Mental Health and Substance Abuse Services, 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 technical assistance 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), Department of Human Services (DHS), and ACF. She analyzed and wrote federal semi-annual reports as required by ACF related to the SOC demonstration grant, managed the five-year \$2 million 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 technical assistance 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 ABA therapist, Andrea provided quality assurance tools and training for school programs and staff. She designed, implemented, and monitored behavior and skill development programs for children across the 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 quality assurance 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 quality assurance 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 quality assurance 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 child care worker, Andrea was responsible for managing care for boys with emotional difficulties by providing behavioral modification, coping skills, and support. She determined personal goals and wrote reports in accordance with Individualized Education Plans. She also worked privately with a special needs family.



**Chris Fanikos, MPH**

SENIOR CONSULTANT  
Berry, Dunn, McNeil & Parker, LLC

**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

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.

**KEY QUALIFICATIONS**

- Data professional with experience in architecture, engineering, and analysis
- More than 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, West Virginia, 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 subject matter expert for the Tips and Complaints 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 (MMIS) 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 Medicaid Enterprise Systems (MES) outcomes and metrics. This work has involved building a modern, automated, cloud-based data collection, extract-transform-load (ETL), and visualization platform using a combination of Amazon Web Services (AWS), Snowflake, and Tableau.



– **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 Enterprise Data Solution (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) & Child Welfare Initiatives (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)**



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, including the establishment of the State's Health Information Exchange (HIE) and grant-funded research focusing on telehealth and behavioral health utilization during COVID.

**Brigham Women's Hospital, Division of Pharmacoepidemiology & Pharmacoeconomics (05/2018 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.





## Danielle Pelletier, MBA, MPH, PMP®, Prosci® CCP, CPHIMS, CSM, LSSGB

PRINCIPAL

Berry, Dunn, McNeil & Parker, LLC



### EDUCATION AND CERTIFICATIONS

MBA, Marylhurst  
University

MPH, Johns Hopkins  
University

BS, Physical Therapy,  
University of New England

Prosci® Certified Change  
Practitioner

Certified Professional in  
Health & Information  
Management Systems  
(CPHIMS)

Certified Scrum Master  
(CSM)

Lean Six Sigma Green  
Belt (LSSGB) certification  
Certified Project  
Management  
Professional® (PMP®)

### PROPOSED PROJECT ROLE

General Project Manager

### MEDICAID EXPERIENCE

13 years

Danielle Pelletier is a principal on BerryDunn's Consulting Team with more than 24 years of professional experience working in and with the private and public health and human services (HHS) sectors as a clinician, hospital administrator, and consultant to health insurers and state governments. She is focused on providing business analysis, process improvement, project management, change management, strategic planning, IV&V, and quality assurance services to help clients with policy, program, and IT system planning, implementation, and operations. Her diverse experience provides her with a solid, multidimensional understanding of today's HHS and public health landscape.

### KEY QUALIFICATIONS

- 24+ years of leadership experience working in and with private- and public sector HHS and public health organizations at the federal, state, and local levels
- Extensive experience providing project management and organizational change management guidance and support and performing stakeholder facilitation and engagement, feasibility studies (inclusive of alternatives and cost benefit analyses), business process/workflow mapping and redesign, programmatic and technical system requirements development, IT system procurement and implementation oversight, and programmatic and IT strategic planning
- Leads BerryDunn's largest, most complex HHS and public health agency projects



## PROJECT EXPERIENCE

### **BerryDunn (08/2011 To Present)**

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

*Community-Based Residential Treatment Facilities Project Management Services (06/2024 to present)*

Danielle is serving as principal on this project to provide project management and stakeholder engagement support for HCA's project to establish community-based residential treatment facilities in two Washington counties. Key activities include developing a project management plan, project schedule, stakeholder engagement plan, and communication plan; workgroup planning and facilitation; and coordination and input into key project documents.

*Olympic Heritage Behavioral Health Facility Project Management Services (04/2024 to present)*

Danielle is serving as principal on this project to provide project management and stakeholder engagement support for HCA's project to establish a behavioral health facility in Tukwila, Washington. Key activities include developing and maintaining a project management schedule, assisting HCA with project planning activities, and providing project management support (e.g., meeting facilitation, deliverable development, procurement planning).

*Behavioral Health Bed Registry and Referral Needs Assessment (02/2024 to present)*

Danielle is serving as principal on this project to provide support and information gathering to help inform HCA's development of a same day/rapid access to behavioral healthcare. Key activities include conducting a literature review of national and state use of a bed registry and electronic referral tools, developing questionnaires for interested party surveys and discovery sessions, conducting surveys, planning and facilitating discovery sessions, analyzing results from information gathering activities, conducting a needs assessment, including recommendations, and developing technical assistance materials for providers.

*Behavioral Health Service Delivery Guide (04/2023 to 09/2023)*

Danielle served as principal on this project to support the development of a web-based Behavioral Health Services Delivery Guide (BHSDG). Key activities include assisting HCA with a high-level assessment of existing systems, planning and facilitating visioning and discovery sessions, developing high-level requirements, and developing an implementation roadmap for the BHSDG. In addition, BerryDunn assisted in the identification of data sharing agreements that may be needed for the BHSDG.

*Institutions of Mental Disease (IMD) Waiver Health Information Technology (HIT) Implementation Requirements Strategic Planning (05/2023 to 06/2023)*

Danielle served as the principal for the HCA IMD Waiver HIT implementation requirements strategic planning project. Key activities include research of background documentation, leading efforts in information gathering through visioning and discovery sessions and developing an IMD Waiver HIT Requirements Strategic Plan and Roadmap.

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

*Consulting Services for Business Process Mapping to Inform a Comprehensive Child Welfare Information System (CCWIS) Procurement (05/2024 to present)*

Danielle is serving as principal on this project facilitating department leadership discussions, engaging state and interested parties, performing research, assessing organizational change



readiness and training and communications structure, and leading the development of business process maps and other planning documents for the procurement of a new child welfare case management system.

- **Oklahoma Human Services (OKDHS)**

*Organizational Change Management (OCM) Services (01/2024 to present)*

Danielle is serving as the principal for the OCM Services to support the OKDHS Digital Transformation Office (DTO) Optimization Project. Key activities include conducting change readiness surveys and listening sessions, developing and executing an OCM plan, conducting readiness maturity assessments, developing an OCM knowledge transfer plan and an OKDHS OCM program and resource plan.

- **Iowa Health and Human Services (DHHS)**

*Corporation Technology Cost Allocation Project (12/2023 to present)*

Danielle is serving as the principal for the Corporation Technology (CorpTech) Cost Allocation Project. Key activities include serving as the primary contact for the engagement, supporting the project manager, working to ensure the project team has the necessary resources, and serving as a subject matter expert on cost allocation for shared solutions.

- **Oregon Department of Early Learning and Care (DELIC)**

*Independent Quality Management Services (IQMS) for Provider Management Project (12/2023 to present)*

Danielle is serving as the IQMS principal for the Provider Management Project. Key activities include serving as the primary contact for the engagement, supporting the project lead in managing the project, participating in risk assessment, quality planning, and conducting quality reviews of the IQMS deliverables.

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

*Strategic Planning (04/2023 to present)*

Danielle serves as project principal on this project assisting 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.

- **Oregon Health Authority (OHA)**

*iQMS for Behavioral Health Data Warehouse Implementation (09/2021 to present)*

Danielle is serving as principal on this project to provide iQMS/IV&V services for the first project in a portfolio of four behavioral health data solution modernization projects. BerryDunn will perform an initial and ongoing risk assessment and will provide quality planning, quality control (including review of solution vendor deliverables), and ongoing quality assurance assessment and reporting services to help ensure successful implementation of the behavioral health data warehouse.

- **Wyoming Department of Health, Public Health Division**

*Performance Management and Quality Improvement (PM/QI) and Strategic Map Implementation Support (07/2023 to 06/2024)*

Danielle served as principal on this project to provide PMQI training and technical assistance and on a related project to support implementation and monitoring of the Public Health Division's strategic map.

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



*Consulting Services for a Statewide Needs Assessment and State Plan (01/2024 to 05/2024)*

Danielle served as project principal on the BerryDunn team that facilitated DAIL leadership discussions; engaged state, community, and other interested parties; performed research; analyzed information and assessed results; and made 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.

– **Alaska DOH Section of Public Health Nursing (SOPHN)**

*Public Health Electronic Health Record (EHR) Planning and Procurement (12/2022 to 05/2024)*

Danielle served as the principal on this project for the planning and procurement of the Public Health EHR. Key activities included conducting a needs assessment and business process planning; procurement planning including the development of functional and technical requirements, a market and fit-gap analysis, development of the Request for Proposal for solicitation; facilitation support for vendor demonstrations, and post-solicitation support to support vendor/contract management.

– **Alaska Department of Health (DOH), Division of Behavioral Health**

*988 Suicide and Crisis Lifeline IT Solution Planning Project (05/2023 to 03/2024)*

Danielle served as the principal on this project. Key project activities included performing a needs assessment, exploring the existing funding sources to support 988 implementation, and conducting an alternatives analysis to identify the best-fit IT solution in implementing the 988 Suicide & Crisis Lifeline across Alaska.

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

*Office of Children's Services Comprehensive Child Welfare Information System (CCWIS) Planning and Procurement (04/2022 to 02/2024)*

Danielle served as principal 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, developing IT system requirements and associated procurement documentation, performing an alternatives analysis and cost benefit analysis, and providing support to OCS with the procurement of the new CCWIS.

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

*Consulting Services for a Workforce Development Needs Assessment (08/2023 to 02/2024)*

Danielle served as principal on this project to assess the training needs of the workforce for the Developmental Disabilities Section through facilitating discovery sessions with interested parties, performing research, and developing needs assessment findings and recommendations for DHHS to improve workforce development strategies across the state.

– **Mississippi Department of Human Services (MDHS)**

*Legacy Systems Assessment, IT Feasibility Study, and Procurement Support (08/2021 to 02/2024)*

Danielle served as principal on this project assisting MDHS in planning for the replacement of several legacy mainframe systems that support the agency's Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF) Program, Child Care Program,



and Child Support Enforcement Program. BerryDunn performed a legacy systems assessment, requirements analysis, alternatives analysis, cost benefit analysis, and IT feasibility study to inform MDHS' IT system(s) modernization path, in compliance with federal requirements and guidelines. BerryDunn also developed the RFP for the IT solution vendor and supported MDHS throughout the procurement process.

– **Alaska DOH**

*Division of Behavioral Health IT System Planning and Procurement (01/2022 to 01/2024)*

Danielle served as principal on this project, which included performing a needs assessment to understand the strengths and challenges related to DBH's 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 DBH achieve its vision and goals, developing IT system requirements and associated procurement documentation, and providing support to DBH with the procurement and implementation of the new IT system.

*Health Information Exchange (HIE) Planning and Procurement (08/2021 to 09/2023)*

Danielle served as principal on this project. Key project activities included conducting market research, facilitating discovery sessions, conducting a needs assessment, developing functional and technical requirements, developing the RFP and vendor evaluation materials, and supporting the procurement process. BerryDunn's activities also included conducting post-procurement activities such as development and submission of the operations advance planning document update (OAPD-U), deliverable review and feedback, and training of DOH staff to assume the role of contract monitor.

– **Arizona Department of Health Services**

*Health Care Institutions' Licensing Operational Assessment (05/2023 to 11/2023)*

Danielle served as the principal on this project. Key project activities include issuing web surveys, planning and facilitating discovery sessions, developing operational assessment findings, and developing an operational assessment report and roadmap.

– **Missouri Department of Mental Health (DMH)**

*Business Process Redesign and Business Planning for Electronic Health Record (EHR) Implementation (06/2022 to 05/2023)*

Danielle served as principal on this project to perform extensive business process redesign for the Division of Developmental Disabilities and Division of Behavioral Health in preparation for procurement and implementation of an EHR solution for its state-operated facilities. BerryDunn also developed solution requirements and a scope of work for the solution vendor; lead organizational change management and organizational development activities; and developed project, process, and outcomes measures and associated monitoring plan.

*Strategic IT Roadmap and Project Charter Development (11/2021 to 03/2022)*

Danielle served as principal on this project to perform an assessment of business and technology needs for the Division of Developmental Disabilities and Division of Behavioral Health. The assessment included recommendations to inform DMH's future activities related to procurement of an electronic health record (EHR) solution for its state-operated facilities, and it resulted in a strategic IT roadmap. BerryDunn also facilitated development of the project charter, including defining the project vision, goals and objectives; roles and responsibilities; stakeholder impacts; cost model; return on investment; and other key elements to help ensure successful EHR



implementation.

– **Non-profit Community-Based Behavioral Health Managed Care Organization (MCO)**

*Organizational and Business Process Redesign (11/2021 to 03/2023)*

Danielle served as principal on this project, which included leading the client through redesign of their organizational structure and performing associated activities, such as performing job impact analyses, developing career pathways, and updating job descriptions. In addition, BerryDunn provided Lean process redesign training to the client staff and facilitating business process redesign of several core processes. In support of these redesign activities, the BerryDunn team provided a series of leadership development and staff development workshops, and used instructional design methods to help the client develop and deliver staff training. BerryDunn also provided the client with organizational change management (including communications development and coaching) and project management support throughout the project.

– **Oregon Department of Environmental Quality (DEQ)**

*Strategic Planning Initiative (08/2020 to 12/2022)*

Danielle served as engagement manager on this project assisting the DEQ with development of a five-year strategic plan that incorporates key goals such as integration with state public health agencies and diversity, equity, and inclusion efforts. Key project activities included gathering information from a broad group of stakeholders, performing an environmental scan, developing a stakeholder assessment and recommendations report, facilitating strategic planning meetings with the project steering committee and DEQ leadership, developing the strategic plan, and developing an implementation plan and implementation monitoring plan.

– **Hawaii Office of Language Access (OLA)**

*Consulting Services for On-Site Language Access Compliance Monitoring Program (06/2022 to 10/2022)*

Danielle served as principal on this project, which included engaging with OLA interested parties, performing best practices research, making recommendations, and developing a scope of work for an on-site compliance monitoring program for state agencies.

– **West Virginia Bureau for Behavioral Health (BBH)**

*Data Management Solution Planning and Procurement Support (08/2021 to 04/2022)*

Danielle served as principal on this project, which included performing a needs assessment to understand the strengths and challenges related to behavioral health data management today and BBH' vision and goals for the future. BerryDunn developed requirements for a modernized data management solution, performed a fit-gap analysis with the State's current enterprise data solution, and made recommendations regarding the best path forward to help BBH achieve its vision and goals. Should BBH move forward with a procurement, BerryDunn will provide procurement support to BBH.

– **Hawaii Department of Health (DOH)**

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

Danielle served as engagement manager for this business process redesign project spanning four BHA Divisions. Key activities include performing a current environment assessment (including issuing web surveys and facilitating fact-finding sessions), facilitating business process redesign activities (including as-is and to be business process mapping sessions), performing organizational change management, developing IT system requirements and an RFP for a solution integrator for a case management and electronic health record solution, and providing procurement support.



– **Connecticut Department of Children and Families (DCF)**

*Adoption/Guardian Needs Assessment (05/2021 to 08/2021)*

Danielle served as principal on this project performing a current assessment of DCF's adoption and guardianship programs. Project activities included evaluating strengths and challenges in the current business and technical environment, developing findings related to gaps between the current environment and DCF's desired future environment, and providing recommendations to address the gaps, which will serve as a roadmap to help DCF achieve its desired future environment vision and goals.

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

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

Danielle served as engagement manager for the BerryDunn team performing a current environment assessment and gap analysis for MDHHS' disease surveillance system. Key activities include facilitating fact-finding sessions and business process mapping sessions to gain an understanding of the challenges in the current environment and the vision and needs for the desired future environment, performing a gap analysis, and providing recommendations for MDHHS' disease surveillance system modernization efforts.

– **North Dakota Information Technology (NDIT) and Department of Human Services (DHS)**

*SPACES Integrated Eligibility System Operational Assessment (08/2020 to 02/2021)*

Danielle served as engagement manager on this project performing a thorough operational assessment of North Dakota's technology solution that supports eligibility-related processes for the agency's Medicaid, SNAP, TANF Program, and Low Income Home Energy Assistance Program (LIHEAP). The operational assessment included a review of several areas including governance, process, technology, finance, staffing/structure, organizational change management, policy, and physical environment. Services provided included performing information gathering activities (i.e., web surveys, meetings, and process mapping) and developing findings and recommendations to help North Dakota achieve its vision and goals for the future.

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

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

Danielle served as project manager on this project assisting ADES in planning for the replacement of three legacy mainframe systems that support the agency's SNAP, TANF Program, Child Care Program, and LIHEAP. This project involved performing a requirements analysis, alternatives analysis, and a cost benefit analysis for potential future system alternatives and developing a thorough Implementation Advanced Planning Document (IAPD) and a DDI Statement of Work to procure replacement systems.

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

*Health Information Technology (HIT)/HIE Support Services (04/2020 to 10/2020)*

Danielle served as project manager on this project to assist PRDoH with planning and implementation of an HIE. Services provided by Danielle and the BerryDunn team include performing an HIT assessment and developing recommendations and an HIT roadmap to help ensure successful establishment of the HIE. In addition, BerryDunn is providing project management services for HIE planning and implementation activities, and other support such as development of the HIT IAPD and updates to Medicaid Information Technology Architecture (MITA) State Self-Assessment (SSA) documentation.



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

*Data System Assessment (08/2019 to 09/2020)*

Danielle is engagement manager for this project to assess the current MCH data systems and end user applications, identify gaps and make recommendations, and develop requirements to enable the MCH Division to procure services and solutions needed to meet future data systems' needs. These needs include but are 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 relates to Title V block grant MCH national performance measures and State of Indiana-specific initiatives.

– **Washington Department of Health (DOH)**

*Data System Assessment (10/2019 to 03/2020)*

Danielle served as project manager performing an assessment of the future needs for a long-term 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.

– **Nevada Silver State Health Insurance Exchange (SSHIX)**

*Lessons Learned (12/2019 to 01/2020)*

Danielle served as project manager for this initiative to gather lessons learned regarding SSHIX's transition from a State-Based Marketplace-Federal Platform (SBM-FP) to a full State-Based Marketplace (SBM). Outcomes achieved include identifying aspects of the transition that worked well, aspects of the transition that did not work well, and key stakeholder recommendations to improve what did not work well.

– **Washington Health Benefit Exchange (WAHBE)**

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

Engagement manager overseeing performance of an assessment to understand challenges in the current environment and needs for the future related to an LMS, develop requirements and use cases, perform an alternatives assessment, and make recommendations.

*System Development, Maintenance and Operations (SDMO) System Integrator Re-Procurement Planning (11/2018 to 05/2019)*

Danielle served as project manager for this engagement to assess and define requirements and develop an RFP for the re-procurement of an SDMO vendor for WAHBE.

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

*Health Insurance Portability and Accountability Act (HIPAA) and Transactions and Code Sets (TCS) Compliance Project (04/2019 to 10/2019)*

Danielle served as the project manager and strategy lead for the development of an IT Roadmap for future DDD IT system environment. She led a team to conduct analysis to define requirements and make recommendations for replacing the outdated claims processing system/interfaces/applications with an internal or external solution.

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

*Integrated IT Service Management (ITSM) (03/2018 to 06/2018)*





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

– **Vermont Department of Health Laboratory**

*Project Management for STARLIMS Laboratory Information Management System (02/2017 to 04/2018)*

Danielle served as the engagement manager/co-project manager for this project with the Department of Health (DOH), leading initial project recovery activities for the implementation of a laboratory information system. Danielle drove intensive efforts with the State project team to assess project risks and issues, gather lessons learned from previous project phases, and understand their project management and other project processes to develop a strategy and recommendations to successfully turn the project around to achieve project goals and objectives. BerryDunn continued to provide project management to the DOH after initial recovery efforts are completed.

– **Hawaii Department of Human Services Med-QUEST Division (MQD)**

*Organizational and Business Process Redesign (07/2017 to 12/2017)*

Danielle served in the role of project director/manager for an organizational business process redesign effort for the customer-facing sections of Hawaii's Med-QUEST Division. Her work included identifying opportunities for the State to leverage their new Medicaid eligibility determination system to improve efficiency and the customer experience. Danielle led an intensive operational assessment of multiple facets of the organization, which culminated in a report that included findings and recommendations for organizational transformation of their eligibility offices, call centers, and customer-facing processes.

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

*EHR System Planning and Procurement Assistance (09/2016 to 01/2017)*

Danielle served as project manager for this project with Department of Health and Environmental Control (DHEC) to plan for selection and implementation of their Electronic Health Record (EHR). Key activities included assessing the current environment, guiding DHEC through its vision for the desired future state, and performing a needs assessment. In addition, Danielle facilitated joint requirements planning (JRP) sessions, led a team in the development of system requirements, and developed a Request for Proposals (RFP) for the EHR.

– **Vermont Agency of Human Services (AHS)**

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

Danielle served as project manager for this initiative to develop uniform reporting requirements and business processes via the HSE to support state and federal reform initiatives. She managed several activities including the evaluation of existing reporting requirements and data collection for specialized programs across Vermont's Medicaid department and three sister departments; the development of a standardized, streamlined, and integrated list of core data elements; and the development of "as-is" business process maps to support specialized programs within the new HSE/Medicaid Management Information System platform.

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

Danielle served as project manager for a lessons learned initiative to help the State evaluate the



governance, management, and oversight of the initial implementation of the first release of the Health Services Enterprise solution (Vermont Health Connect Health Insurance Exchange and MAGI Medicaid eligibility) including the best approach to organizational realignment to meet their goals.

– **Massachusetts HIX/IES Entities**

*IV&V Services (Periodically from 02/2013 to 10/2015)*

Danielle served as the test support lead as part of BerryDunn's IV&V team for the Massachusetts' HIX/IES implementation. In this role, she coordinated and provided oversight of joint testing efforts between the Commonwealth, the Systems Integrator vendor, and BerryDunn test analysts. Her responsibilities also included reporting on daily testing activities to the Commonwealth and federal government, as well as collaborating with the Commonwealth to set the direction for future testing efforts.

Danielle also co-led the HIX/IES Pre-Operational and Operational Readiness Assessments to determine readiness for go-live on October 1, 2013, and she did the same for go-live for open enrollment in 2014. She also assisted with completion of testing efforts related to CMS' Blueprint Test Scenarios, and she reviewed deliverables developed by the Systems Integrator to evaluate compliance with mandatory Affordable Care Act requirements.

– **Massachusetts Executive Office of Health and Human Services (EOHHS)**

*Next Generation Systems Planning Project and MITA SS-A (10/2014 to 02/2015)*

Danielle served as the engagement manager/project manager for this project, providing project management, oversight, and subject matter expertise to the project team during the vendor selection process for the Executive Office of Health and Human Services' (EOHHS') Health Information System Project. This work built on our past EOHHS projects where BerryDunn assisted with a MITA State Self-Assessment, requirements development, and RFR development. Danielle led the project team throughout the procurement process, ensuring all activities and decisions are made in accordance with Commonwealth and EOHHS policies and procedures, as well as industry best practices.

– **Vermont Agency of Digital Services**

*Independent Review for E911 Bureau, e911 System (06/2014 to 08/2014)*

Danielle served as project manager for an independent review for the Department of Public Safety's proposed e911 System including an analysis of the costs, the architecture of the solution, the implementation plan, and the vendor's capacity to provide the proposed equipment, support, and services, and the identification of risks and issues that may impact the success of the project.

– **Maryland Health Benefit Exchange**

*IV&V for Maryland's HBE Implementation (03/2013 to 04/2014)*

Danielle provided project management and subject matter expertise for BerryDunn's IV&V team for the MHBE implementation. In this role, she led the MHBE Operational Readiness Assessment to determine readiness for go-live on October 1, 2013, and developed an associated Corrective Action Plan to improve the likeliness of a successful implementation. She also assisted with completion of testing efforts related to the CMS' Blueprint Test Scenarios, and she led the team to bring the project to closure as project manager.

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

*Health Insurance Exchange Planning (08/2011 to 03/2013)*

Danielle worked with the OIC from 2011 to 2013 on several key activities, including developing



the Health Insurance Exchange (HIX) IT Strategic Plan; developing the HIX Business Plan and Financial Sustainability Model; developing a Request for Information (RFI) for an HIX IT solution; assisting with completion of the Blueprint; and providing policy analysis in areas such as Financial Management and the Navigator Program. A core area of her focus involved serving as project manager for West Virginia's Plan Management planning and implementation, leading the State in its efforts to pursue a Plan Management Partnership with CMS.

#### **Health Dialog (2007 to 2011)**

Danielle served as program manager and director of client services for Health Dialog, a provider of population health management, health care analytics, and decision support services. In this role, she managed client relationships on health plan accounts and worked in collaboration with the client to develop and evolve program strategy.

#### **Willamette Falls Hospital (2003 to 2007)**

Danielle served as director of ambulatory services, with responsibility for leading all strategic and operational aspects of urgent care, occupational health, and rehabilitation services at the hospital's satellite clinics. She was tasked by the executive team with turning the clinics around and improving scorecard measures including patient and employee satisfaction, clinical quality, and profitability, with significant improvements made in all areas. She also oversaw planning for a new Urgent Care, Lab, and Diagnostic Imaging facility.

As director of rehabilitation services, Danielle led strategic and operational aspects of the inpatient/outpatient department, targeted hospital-wide processes to increase the efficiency and quality of care as a core member of the Patient Flow Design Team, drove the cultural change toward a patient centered model of care delivery; and led a Six Sigma project team to improve the hospital revenue cycle, increasing point-of-service collections from \$0 to \$80,000/month and reducing wait time in Admitting from 30 minutes to nine minutes. She was also a member of the Steering Committee charged with planning for and selection of a new hospital-wide EHR, and she led implementation efforts in several departments.

#### **Jeff Anderson Regional Medical Center (1998 to 2002)**

As an acute care physical therapist from 1998 to 2002, Danielle evaluated and treated post-operative orthopedic, cardiovascular, and neurological patients for the Jeff Anderson Regional Medical Center and the Specialty Hospital in Meridian, Mississippi.



**Darrah Ruiz**

SENIOR CONSULTANT  
Berry, Dunn, McNeil & Parker, LLC

**EDUCATION AND CERTIFICATIONS**

Computer Reservation Systems: SABRE, Apollo, ViewPoint, and EDS  
HRIS: Ceridian and UltiPro  
Course Certificates: Achieve Global Trainer Certified, IDEO Storytelling for Influence and IDEO From Ideas to Actions

**PROPOSED PROJECT ROLE**

General Project Manager

**MEDICAID EXPERIENCE**  
6

Darrah brings 19+ years of experience providing technical oversight, project management, and business process redesign in both state and federal initiatives. She specializes in system enhancements, planning product release roadmaps, and has an extensive background in stakeholder engagement, testing and validation of software, and developing clear, concise technical documentation—from user guides to training materials to APDs—supporting informed decision-making and compliance.

**KEY QUALIFICATIONS**

- 19+ years in IT, providing technical oversight, ensuring quality, risk identification, vendor collaboration, compliance with government standards, and problem-solving during development and testing
- 18+ years of experience applying PMI® and IIBA methodologies, focusing on the end-to-end process for delivering complete solutions
- Skilled in crafting training programs and conducting skill gap analyses, with expertise in workshops that include benchmarking and KPIs—experience applicable to reviewing training strategies
- Experienced in developing clear, concise technical documentation, including user guides, training materials, and APDs, ensuring accuracy and alignment with program objectives
- Created and scaled multiple company-wide learning programs from inception, incorporating succession planning for long-term organizational growth

**PROJECT EXPERIENCE**

**BerryDunn (11/2019 to present)**

– West Virginia Bureau for Medical Services (BMS)  
*Partnership Management Support Project (07/2024 to present)*  
Darrah plays a critical role in supporting the Guam Medicaid program by managing communication materials, maintaining accurate documentation, and ensuring seamless coordination of requests from the Medicaid Director. She leads the research, development, and timely submission of APDs for the U.S. Territory of Guam, supporting funding strategies, compliance, and program sustainability.



*Advanced Planning Document (APD) Assistance (05/2024 to present)*

As an APD writer, Darrah is responsible for the research, development, coordination, and timely submission of APDs to secure federal funding for WV BMS. She is also responsible for tracking all APDs from development, review by the client, and until the approval provided by Center for Medicare and Medicaid Services (CMS). In her role as the PATH Liaison to the APD Consulting Team, Darrah manages two-way communication regarding any impacts on the organization or to any active APDs overseen by the APD Consulting Services Team.

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

*People's Access to Help (PATH) Phase III (11/2020 to 02/2021; 01/2024 to present)*

For phase III of the PATH project, Darrah supports design, development, and implementation (DDI) for the Family Assistance release, helping to ensure effective coordination between development partners and state stakeholders. She is responsible for tracking and refining deliverables, maintaining oversight of the Family Assistance deliverable tracking process, and contributing to document refinement as requested by the state.

She also provides support for UAT daily reporting, biweekly scheduled hotfix summary and change request tracking for the M&O process. She led improvements to the PATH Governance model, writing key processes that enhanced communication and streamlined escalation and decision-making between teams. She regularly engages with the State through email correspondence and weekly meetings to help ensure alignment and progress on project initiatives.

From January to June of 2024, Darrah supported the DDI of the Child Care and Family Assistance releases change management process as a subject matter expert. She tracked current and historical change requests, facilitated intake, and performed follow-up with both internal and external teams to help ensure project deliverables were met. Based on knowledge gaps identified, Darrah developed support materials for stakeholders to create effective and quick-change requests. These efforts facilitated seamless transitions and promoted effective project execution to meet organizational objectives.

Prior to 2024, Darrah was a key contributor to the Child Welfare release DDI phase, playing a crucial role in reviewing documentation for the implementation of a new system. Darrah scrutinized system functionality and design documentation, helping to ensure precision, transparency, and alignment with stakeholder requirements.

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

*Organizational and Business Process Redesign (11/2019 to 12/2023)*

Darrah crafted impactful job skills development initiatives, producing effective job aids, and learning handouts. Her expertise extended to facilitating in-person and virtual seminars that engaged participants. She served as a trusted advisor to branch administrators, front-line managers, and staff. Additionally, she established targeted communication channels for learning about newly introduced Medicaid guidelines as they impacted operational processes and software logic. Darrah offered extensive support for Medicaid eligibility software throughout the software development life cycle. This included overhauling the release cycle process, from scope determination to ongoing maintenance, enhancing efficiency; identifying and addressing specific areas needing support while creating learning opportunities; collaborating with development vendors to improve their value proposition, strengthening partnerships; and leading the transition to virtual life cycle processes during the pandemic for the division.

**Hawaiian Telcom/Cincinnati Bell (2012 to 2019)**

*Senior Enterprise Business Analyst (11/2012 to 2019)*

Darrah successfully launched products for major clients such as HMSA, Kaiser Permanente, and Hawai'i Departments of Education, Health, and Transportation, helping to ensure alignment with



data requirements, timelines, and budgets. She managed the implementation of the \$250M Southeast Asia-U.S. (SEA-U.S.) Trans-Pacific Fiber Submarine Cable System, connecting Indonesia, the Philippines, Guam, Hawai'i, and California. She partnered with C-Level and V-Level management to document the customer journey process using human centered problem statements to identify areas of improvement that could be measured and tracked. Darrah acted as the Scrum Master for agile projects within the internal software development team, guiding the software development life cycle and integrated Cincinnati Bell Customer Relationship Management (CRM) system over preexisting legacy architecture for Hawaiian Telcom call centers that provide recommendations to the user based on network mapping.

*Network Operations IP Analyst (03/2012 to 2013)*

Darrah engaged in close collaboration with front-line support in both field and call center environments, demonstrating a swift and effective approach to IP troubleshooting across diverse business lines and services. This included but was not limited to VoIP, FiOptics, HSDSL, POTS, and other IP-related services. Her proficiency extended beyond immediate issue resolution as she adeptly identified, meticulously documented, and promptly reported network risks. Darrah proactively proposed thorough and strategic solutions to mitigate and address these identified risks, contributing to the overall resilience and stability of the network infrastructure that meet the business rules and compliance of FCC.

*Design Thinking Facilitator (06/2017 to 2019)*

Darrah collaborated with a team to lead learning sessions for ad hoc internal teams, employing the design thinking methodology to address and resolve various problem statements. The program's success led to its extension for enterprise business partners like the Hawai'i Office of Information Technology.

**Apple, Inc. (09/2007 to 2009; 10/2010 to 03/2012)**

As a creative, Darrah identified customer needs through strategic probing questions that uncovered the real goals and challenges. She provided personalized training sessions covering a range of topics, from mastering iPod functionality to installing and utilizing software on Apple devices. Her expertise extended to demonstrating how a network of Apple computers could enhance business security and efficiency. She specialized in Apple and Apple-certified software, delivering in-store ad hoc presentations tailored to both individual users and large businesses, helping to ensure they maximized their technology investments.

**Servco Pacific, Inc. (11/2006 to 02/2012)**

As a training and development specialist, Darrah identified and addressed departmental training needs, orchestrating sessions with documentation. She delivered ad hoc training on leadership, teamwork, customer service, and workload prioritization for individual contributors to managers and individual contributors across wholesale and retail businesses. She managed the delivery of all company surveys, consulted on in-depth analyses of survey results, and guiding action planning for each business unit. Darrah conducted extensive reviews and offered management assistance in formulating employee development plans. She delivered communication style, DiSC, and personality type Myers-Briggs Type Indicator (MBTI) reviews across in-tact teams and functional groups associated by project or initiative with the goal of building cohesiveness. At the annual Manager's Conference, Darrah designed the learning activities for 200+ participants which addressed the company mission statements and values. Darrah extended her expertise by providing valuable consulting services to front-line managers, focusing on their personal development, staff growth, and addressing human resources matters effectively.



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

**MANAGER**

Berry, Dunn, McNeil & Parker, LLC



### **EDUCATION AND CERTIFICATIONS**

BS, Healthcare  
Leadership, Wheeling  
Jesuit University

AAS, Office  
Administration, West  
Virginia University at  
Parkersburg

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

Dawn Webb is a manager in BerryDunn's Medicaid Practice Group (MPG), providing leadership and project management to West Virginia's Medicaid Information Management System (MMIS) and policy unit projects. She has 30 years of experience in medical claims processing and revenue cycle management, including 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 Certified Professional Coder, a Certified Outpatient Coder, and a Prosci® Certified Change Practitioner, provides a unique perspective to clients across the Medicaid enterprise.

### **KEY QUALIFICATIONS**

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



## 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 Department of Human Services (DoHS) Medicaid enterprise. This involves coordinating the appropriate staff to gather necessary information for the development of APDs, to write APD narratives, and to establish budget tables for the funding request via the Medicaid Detail Budget Tables (MDBTs). This project also includes preparing complete APDs for review, approval, and submission by BMS for delivery to the Centers for Medicare & Medicaid Services (CMS). These activities occur with the development of new APDs and annual and as needed updates to 10 established APDs.

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

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

- IT Control Environment Review (07/2024 to present)
- Certified Community Behavioral Health Clinics (CCBHC) State Plan Amendment (06/2024 to present)
- System Development Life Cycle (SDLC) Coordination Project (06/2024 to present)
- Medicaid and Children's Health Insurance Program (WVCHIP) Enterprise System (MCES) Procurement Assistance Project (04/2024 to present)
- Medicaid Enterprise System (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)
- Public Health Emergency (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)
- Third-Party Liability (TPL) Options Analysis and Procurement Assistance Project(05/2019 to 03/2022)
- Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (08/2020 to 02/2022)

*PERM Project (05/2018 to present)*

Dawn serves as the program manager for the PERM project, managing budgets and project deliverables and collaborating closely with the client to help ensure the team fully meets the project requirements and expectations. This project includes validating claims payment or eligibility errors, researching error remedies, and providing oversight for resolution of PERM errors cited for WV.

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

*MMIS Fee Schedule and Edit Quality Review (09/2017 to 04/2023)*

Dawn served first as project subject matter expert (SME) before beginning her tenure as project manager. She 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 Federally Qualified Health Centers (FQHCs). In this role, Dawn was responsible for the organization's accounts receivables. This included providing oversight of each health center's front-line staff, providing communications



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

**Unisys (06/2004 to 11/2009)**

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

**Charleston Area Medical Center (08/2004 to 09/2004)**

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

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

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

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

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

**University Health Associates (09/1996 to 07/2001)**

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

**Acordia National (12/1994 to 05/1996)**

Dawn began her career as a medical claims examiner.

**PUBLICATIONS AND PRESENTATIONS**

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



## Ebony Carter, PMP®

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

### EDUCATION AND CERTIFICATIONS

MS, Health Science,  
focus in Community  
Health, Towson University

BS, Health Science, focus  
in Community Health,  
Towson University

Certified Project  
Management  
Professional® (PMP®)  
Technical Institute of  
America-Project  
Management Certification  
Training Course

### PROPOSED PROJECT ROLE

General Project Manager

### MEDICAID EXPERIENCE

16 Years

Ebony Carter is a highly qualified Healthcare Analyst and Program Administrator professional with 16 years of experience in healthcare policy, Medicaid and Children's Health Insurance Program (CHIP) programs, eligibility, Medicaid Management Information Systems (MMIS), customer satisfaction, and program management.

### KEY QUALIFICATIONS

- PMI® Certified Project Manager Professional® with more than two years of experience managing complex projects

### PROJECT EXPERIENCE

#### BerryDunn (03/2022 to present)

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

##### APD Assistance (05/2023 to present)

Ebony serves as a subject matter expert (SME), where she supports the strategic planning of APDs. In this role, Ebony assists the State team with processes for renewal and tracking progress in the development and submission of APDs to the Centers for Medicare & Medicaid Services (CMS) by assisting with the development, updates, and management of multiple APDs in support of funding for new systems projects.

##### MITA 3.0 State Self-Assessment (SS-A) Maintenance and Annual Update Assistance Project (11/2022 to present)

Ebony serves as the project manager for the MITA Annual Update SS-A project life cycle by leading the team to complete assessments of the business process areas, capability matrices, gap analysis, SS-A report, technical management strategy report, data management strategy, and roadmap, and update MITA related reports.

##### PERM Project APD Support (08/2022 to present)

Ebony assists with preparing APDs for approval. This includes updating the APD narratives and drafting the Implementation Advance Planning Document Update (IAPD-U) Transmittal Letter.



*PERM Project (03/2022 to present)*

Ebony is serving as a deputy project manager for the PERM Project, responsible for assisting the project manager with project monitoring

*Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (09/2023 to 09/2024)*

Ebony served as an MMIS SME on the West Virginia MES MSP Project.

*MMIS Fee Schedule and Edit Quality Review (04/2022 to 04/2023)*

Ebony served as a project SME for the Fee and Edit project. She was responsible for researching and validating fee schedules and/or edits and delivering outcomes to the State. While researching, she also reviewed federal policy and state regulation to help ensure that the fee schedule and edits are in line with existing and current policies.

*Public Health Emergency (PHE) Support Project (03/2022 to 06/2022)*

Ebony assisted with tasks related to the PHE project.

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

*MMIS Fiscal Agent Solicitations Consulting Services (11/2023 to 02/2024)*

Ebony served as a SME to support HCS's MES modernization and procurement activities by collaborating directly with HCS leadership. Ebony supported HCS by conducting research and assists with transition activities.

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

*Forensic Auditing and Accounting (06/2023 to 09/2023)*

Ebony served as a SME to analyze claims processes and procedures, identify potential program integrity risks, and review payment activity post reimbursement to providers.

**General Dynamic Information Technology (10/2021 to 03/2022)**

Ebony worked as a senior business analyst with North Carolina State Medicaid MMIS to monitor and understand business functions, gather business requirements for enhancement or modification using waterfall or Agile methodologies, and create system estimates to present to the technical team and implementation director for approval. She conducted face-off meetings with the State to understand, explain, and address business needs, and led design efforts. Ebony collaborated with project managers and technical staff to help ensure successful implementation of system enhancements.

**NCI, Information Systems (11/2018 to 10/2021)**

Ebony worked as a data processing SME with CMS to provide technical direction and guidance to the Data Processing team and to CMS stakeholders. She created training material in line with CMS guidelines and federal regulation requirements, updated standard operating procedure guidelines for the team, and monitored the Data Processing workflow. Ebony performed quality assurance reviews of completed audits, conducted queries, and communicated data findings in written reports, oral reports, and presentations. She analyzed data to determine appropriate actions and was responsible for determining knowledge gaps, work process improvements, and technical system updates to assist with creating streamlined audit processes. She created a review schedule to help ensure milestones were met on time and reviewed all State MMIS systems to help ensure claims were adjudicated correctly, beneficiaries were eligible for services, and providers were enrolled and screened appropriately.

**A+ Government Solutions, LLC/CNI Advantage LLC (08/2015 to 11/2018)**

Ebony worked as a program operations manager with CMS to manage a team of 31 health insurance payments analysts responsible for conducting audits to determine if reimbursements to medical providers were compliant. She analyzed federal Code of Federal Regulations (CFR) and State regulations/policies for Medicaid and CHIP reimbursements, interacted with Medicaid state



personnel to schedule audits and explain audit findings, and conducted queries and communicated findings. Ebony created reports to share with CMS stakeholders and state personnel, collaborated with Data Processing (DP) state leads and state personnel to determine readiness for the initiation of DP reviews, and assisted with development of review workflow processes. Ebony conducted detailed audits of MMIS to determine if states paid Fee-for-Service and Managed Care claims according to Medicaid CFR and state regulations under the PERM project. She researched, analyzed, interpreted, and applied provider Medicaid enrollment, recipient eligibility (CHIP and Medicaid), risk-based screening, claims processing, CFR, and state regulations when conducting audits of state claims. Ebony created operating procedures for navigating state MMIS systems, managed workflow through State Medicaid Error Rate Findings (SMERF) system and used the SMERF system, state MMIS, and eligibility systems to conduct audits. Ebony communicated with CMS about impediments to the team's ability to complete audits accurately and on time.

**Maryland Department of Health and Mental Hygiene (DHMH) (07/2008 to 08/2015)**

Ebony worked as an agency grant specialist to monitor the life cycle of all grants and the budget and expenditures for DHMH Office of Preparedness and Response (OPR) cooperative agreements for the Department of Health and Human Services, Centers for Disease Control and Prevention (CDC), and Assistant Secretary for Financial Resources (ASPR). She supported senior management in maintaining fiscal records of preparedness activities such as syndromic surveillance, plan implementation, incident reports, and after-action reports. She designed, developed, implemented, and interpreted grants assistance management policies, procedures, and best practices for monitoring cooperative agreements for CDC and ASPR. Ebony monitored a budget over \$30 million and was responsible for accounts payable according to the state of Maryland General Accounting principles. She developed standard operating procedures that adhere to CFR and Code of Maryland Regulations (COMAR) regulations, developed information packages for employees and awardees, and served as liaison to represent senior fiscal officers at staff meetings and conferences. Ebony monitored 23 counties and one city in the Medicaid Transportation Grant program for budget requirements and to help ensure grantees and providers followed program goals, objectives, and regulations in accordance with CFR and COMAR. She analyzed and evaluated the program for efficiency and effectiveness of healthcare delivery and health initiatives by participating in routine audits (on-site reviews) of each jurisdiction helping ensure compliance with COMAR regulations, Medicare and Medicaid regulations, and Maryland State Transmittals. She analyzed data for recipient Medicaid Transportation needs, supported senior analysts in providing leadership and Medical Assistance Transportation guidance to state legislatures during conferences and workshops, and provided guidance on managed care or Medicaid fee-for-service appeals. She managed, developed, implemented, and evaluated training curricula on Medicaid Managed Care and Medicaid Transportation program. She developed standard operating procedures in drafting COMAR regulations to improve compliance with state and federal Medicaid and Medicare regulations.

**Ethan Wiley, MPPM, LSSGB,**



PMP®, Prosci® CCP

SENIOR MANAGER  
Berry, Dunn, McNeil & Parker, LLC

EDUCATION AND CERTIFICATIONS

MPPM, Concentration on Policy Analysis, University of Southern Maine  
Edmund S. Muskie School of Public Service  
Certificates of Graduate Study: Applied Research and Evaluation Methods, Performance Management and Measurement, and Social Policy Analysis  
BA, Political Science and History, University of Maine at Farmington  
Certified Project Management Professional® (PMP®)  
Prosci® Certified Change Practitioner  
Certified Lean Six Sigma Green Belt (LSSGB)

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

12 years



Ethan Wiley is a senior manager for BerryDunn’s Consulting Services Team with innovative Medicaid project and program experience across the range of the Medicaid enterprise. His specialties include negotiating Medicaid policy on behalf of states with their federal partners, program development, and team leadership. A practiced project manager in both Medicaid IT and policy projects, Ethan has engaged in key leadership roles in projects designed to evaluate federal compliance, design innovative 1115 and 1915(c) waivers, and implement health IT systems. He has a proven record of successfully managing both short-term projects and complex, multiyear initiatives. Most recently, he has led the Medicaid Innovation Program as part of the West Virginia Enterprise Portfolio Management Office (EPMO) where he oversaw a team of project managers, collectively leading multiple concurrent Medicaid projects.

KEY QUALIFICATIONS

- 11 years’ experience successfully assisting eight state Medicaid agencies with critical initiatives such as the federal Centers for Medicare & Medicaid Services (CMS) negotiations of 1115 waivers, 1915(c) HCBS waivers, and a multitude of State Plan Amendments (SPAs)
- Eight years’ experience as a program and portfolio manager, at times overseeing over a dozen successful Medicaid Enterprise projects and initiatives concurrently
- Seven years as a Certified PMP® overseeing multiple multiyear Medicaid Enterprise projects to successful completion with project budgets ranging from \$15k to \$3.4mm

PROJECT EXPERIENCE

BerryDunn (07/2014 to present)

– West Virginia Bureau for Medical Services  
*Take Me Home (TMH) HCBS Quality Initiative (10/2024 to present)*  
As the portfolio manager, Ethan works alongside the project management team to help ensure the deliverables and time frames are being met. He provides overall reviews, program oversight, and project health monitoring.



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

Serving as portfolio manager, Ethan supports the program manager with project oversight, monitors decisions, action items, risks and issues. Additionally, he oversaw tasks for the implementation of Senate Bill 820 provisions, helps to facilitate advisory committee workgroups, and research on new regulations for Dual Special Needs Program as noted in the Medicare Part D Final Rule.

*Certified Community Behavioral Health Clinics (CCBHC) SPA Phase III (11/2023 to present)*

Ethan serves as the portfolio manager where he oversees the project team project management, budgeting, and monitoring decisions, action items, risks and issues. He has assisted the client and team with a variety of activities, such as SPA submission and approval, and policy and provider application development including oversight of the public comment process.

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

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

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

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

*Medicaid Information Technology Architecture (MITA) 3.0 State Self-Assessment (SS-A) Maintenance and Annual Update Assistance Project (06/2019 to present)*

Ethan oversees a team of nine that assists the Department of Human Services (DoHS) in meeting compliance with the 88 requirements of the MITA 3.0 SS-A as prescribed by CMS. The objective of this project is to assist the DoHS with MITA life cycle maintenance activities, including preparation of the MITA 3.0, SS-A Annual Update, enterprise-wide MITA support for ongoing system and business process improvement projects, and training efforts to support activities related to the annual update. BerryDunn's assistance with over a dozen Advance Planning Document (APD) submissions has provided millions of dollars in value to the State.

*Technical Assistance and Program Support Project (TAPS) (11/2018 to present)*

Ethan oversees this project and provides project management, subject matter expertise, and support for the DDI of multiple Medicaid business initiatives and activities that BMS may undertake—such as Third-Party Liability (TPL) procurement support, interim support for Payment Error Rate Measurement (PERM) audits, and mental health parity analysis. Ethan and his team provide critical project support such as program research, financial analysis and modeling, waiver construction, regulatory analysis, federal and stakeholder negotiation, and program



development. To date, this team has helped BMS achieve its objectives on projects such as the development of Section 1135 Disaster SPAs, managed care organization (MCO) readiness reviews, and Minimum Acceptable Risk Controls for Exchanges (MARS-E) Security and Privacy Assessments.

*1915(c) Children with Serious Emotional Disturbance (CSED) Waiver Development Project (09/2018 to present)*

As program manager, Ethan planned and executed the design, successful negotiation, and implementation of a CSED waiver program. The CSED waiver provides services that are additions to Medicaid State Plan coverage for those enrolled in the CSED waiver program. The CSED waiver permits West Virginia to provide an array of services that enables children who would otherwise require institutionalization to remain in their homes and communities. In addition, it is anticipated that this waiver will reduce the number of children housed both in state and out-of-state in psychiatric residential treatment facilities (PRTFs) and shorten the lengths of stay for children who require acute care in PRTFs. Ethan continues to support the state with ongoing research, facilitation and implementation tasks in support of the CSED Waiver Program.

*EPMO (07/2018 to present)*

As program manager of the Medicaid Innovations Program for the West Virginia BMS EPMO, Ethan leads a team of three project managers executing six Medicaid policy and program development projects. In this role, he is responsible for aligning project outcomes with the organization's overarching goals and master strategy for its Medicaid and human services enterprise.

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

To support the success of phases 3 and 4 of this important project, Ethan oversees the project manager and deputy project leads. Ethan and the project team are working to help ensure a quality program design that will meet the needs of West Virginia and those receiving vital support from this program by completing four quarterly reports to CMS, annual reports, and retrospective reviews of metrics for the state. In addition to overseeing ongoing implementation of managed care services, reporting requirements, and data analysis to support decision-making, Ethan overseeing network adequacy assessments and other efforts to help ensure quality program design.

As the data management lead for phase 2 of the project, Ethan designed tools to assist in performance management and measurement, including executive dashboards and quality metrics. In addition, Ethan led reporting efforts and designed processes to conduct actuarial analysis of required budget neutrality components of West Virginia's program.

Working as the lead policy analyst and subject matter expert for phase 1 of the SUD project, Ethan assisted in the development and successful negotiation of a Section 1115 Demonstration Project to undertake SUD delivery system transformation efforts in West Virginia. Through this Section 1115 waiver, West Virginia has the opportunity to test innovative policy and delivery approaches to reform systems of care for individuals with SUD.

*ARPA Section 9813: Mobile Crisis Grant Project (07/2021 to 12/2022)*

Serving as program manager, Ethan oversaw this project and provided subject matter expertise and support for the DDI of an SPA to add a Mobile Crisis Program to the West Virginia Medicaid Program. As part of this, Ethan participated in writing and planning assistance for the ARPA State Option to Provide Qualifying Community-Based Mobile Crisis Intervention Services. In organizing the response, writing the application, and assisting BMS in communications to CMS, our team helped BMS in the successful award from CMS to the State of an \$847,527 grant to





implement qualifying community-based mobile crisis intervention services.

*TPL Options Analysis and Procurement Assistance Project (07/2018 to 12/2018)*

As project manager, Ethan determined the research design and methodology to perform an analysis of TPL options. This included leading the project team through the investigation of both the solution and financing alternatives for the State. This research helped West Virginia save money in recoupments and system costs as well as conduct its Health Insurance Premium Payment program and Medicaid buy-in programs through new and innovative approaches.

*Gap Analysis and Project Management Services (GAPMS) (10/2016 to 06/2018)*

As project manager, Ethan planned and led the execution of a large-scale ACA compliance effort across West Virginia's Medicaid Enterprise. He provided stakeholders with detailed policy analysis and research deliverables during the project, and oversaw the design and inauguration of seven subprojects created under GAPMS.

*Adult Quality Measures Grant Project (06/2016 to 12/2016; 06/2017 to 12/2017)*

As project manager, Ethan oversaw a team that collected and reported on the Medicaid Adult Core Set Measures to help BMS successfully transition from a grant-funded Quality Unit to a state-supported Quality Unit. As a result of this transition, the State can now report on the 33 measures of the Adult Core Set across six domains.

*ICD-10 Transition Planning, Implementation, and Policy Remediation (07/2014 to 02/2016)*

As policy analyst and project coordinator, Ethan analyzed and remediated 78 distinct policies and overhauled the Provider Manual and Medicaid policy for the agency. He oversaw testing design, system integration testing, and user acceptance testing, along with client acceptance. In addition, he designed, researched, and constructed ICD-10 training modules for BMS staff; designed and built training segments for Medicaid providers and assisted with outreach and engagement; and performed analysis of Medicaid claim data processed through the MMIS to determine financial health and parity in claim operations.

*Utilization Management and Prior Authorization Services Request for Proposal (RFP)*

*Development Project (09/2015 to 12/2015)*

As business analyst, Ethan organized and completed the final development of a state Medicaid agency project to develop a major RFP to select a utilization management vendor. The project resulted in the successful award of the contract to Kepro.

**– Minnesota Department of Human Services**

*Research Studies for Contingency Management (CM) Services (04/2024 to present)*

Ethan is the engagement manager on this project, which is helping Minnesota in a two-phase research project to understand the feasibility, potential design, and federal authorities needed to cover CM services within the State's Medical Assistance program. The resulting product will position the State to move forward with informed policy proposals including a potential Medicaid 1115 waiver. Ethan brings his experience with 1115 waivers provider oversight and serve as the primary point of contact with the DHS project manager.

*1115 Waiver for Justice-Involved Individuals (02/2024 to present)*

Ethan is the engagement manager on this project, which is helping Minnesota support incarcerated individuals through the transition to the community by leveraging options under a potential Section 1115 waiver. Ethan serves as the primary point of contact with the DHS project manager.

*Program Analysis of Implementation of a PACE Program (09/2023 to 06/2024)*

Ethan served as the project manager for a project to help DHS analyze options for the implementation of a PACE program. In this role, Ethan designed an iterative project approach,



oversaw the development of project deliverables, and directed project work for a team of five. In addition, Ethan served as primary point of contact with DHS and provided responsibility for quality of all final project deliverables.

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

*Training and Leadership Development (03/2024 to present)*

Serving as the engagement manager, Ethan oversees a team focused on training and development services for managers in OHHS's Medicaid agency as well as OMS' Senior Leadership team. The overarching project approach centered on adopting and fortifying a matrix-style team to empower team members to enhance collaboration, boost operational efficiency, and drive sustained improvements in project performance.

- **Delaware Department of Health and Social Services (DHSS), Division of Medicaid and Medical Assistance (DMMA)**

*APD Consulting Services (05/2021 to present)*

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

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

*HOME Gap Analysis Project (05/2024 to 08/2024)*

Serving as a subject matter expert, Ethan assisted Iowa DHS in a community-based services redesign project intended to significantly change the current LTSS landscape. The HOME Gap Analysis Project aims to improve Medicaid mental health and disability services as well as the existing HCBS structure.

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

*SPAs and Compliance (12/2020 to 10/2021)*

In order to support PRMP, Ethan served as a subject matter expert for BerryDunn's state plan work. In this role, Ethan researched and analyzed the Medicaid State Plan, drafted amendments, and reviewed state plan materials. Ethan's work included analyzing state plan provisions related to Hospital-Based Presumptive Eligibility, Modified Adjusted Gross Income, and other major eligibility provisions of the State Plan.

- **Nebraska Department of Motor Vehicles**

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

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

- **Michigan Department of Education**

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

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

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

*Project Management for Enterprise Content Management (ECM) Project (08/2015 to 02/2016)*



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Ethan served as project manager on a quality assurance project to oversee the implementation of an ECM solution. He participated in joint application design sessions, coordinated state MMIS and eligibility and enrollment vendors, served as a liaison with four state agencies, and helped facilitate a successful implementation.

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

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

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

**University of Southern Maine, Edmund S. Muskie School of Public Service (09/2013 to 05/2014)**

As a graduate assistant, Ethan made use of SPSS and other data management tools to work with large data sets. He also assisted with data organization and quantitative analysis, and performed literature reviews and analysis.

**Maine Mental Health Partners – CareFirst Program (06/2013 to 09/2013)**

As an intern, Ethan launched a program to map 59 different service line workflows using Microsoft Visio, adapted those workflows into an electronic health interface to serve a network of providers, and plotted services from five different agencies for adaptation into a digital interface.

**The Cutler Institute for Health and Social Policy (11/2012 to 01/2013)**

Ethan served as a research assistant for the Institute, primarily helping to determine the breadth and effectiveness of Medicaid waivers, studying expansion programs and SPAs, performing literature reviews, and assisting with general research.



## Jason Hargrove, MBA, PMP®, CSM®, Prosci® CCP

SENIOR MANAGER

Berry, Dunn, McNeil & Parker, LLC

### EDUCATION AND CERTIFICATIONS

MBA, Business  
Administration, Grantham  
University

BS, Marine Engineering  
Operations, Maine  
Maritime Academy

Certified Project  
Management  
Professional® (PMP®)

Certified ScrumMaster®,  
Scrum Alliance

Certified Agile Leader®  
(CAL-E, CAL-T), Scrum  
Alliance

Prosci® Certified Change  
Practitioner

### PROPOSED PROJECT ROLE

General Project Manager

### MEDICAID EXPERIENCE

20 Years

Jason Hargrove is an experienced leader and implementation manager, delivering information technology software solutions and services in healthcare and engineering for more than 25 years. Jason brings a diverse range of skills and experience, including project management, procurement management, business development, finance, budgeting, contract management, team development, recruiting, and staff management. He leads by example, fostering communication at all levels of the organization and is familiar with complex and difficult situations.

### KEY QUALIFICATIONS

- More than 17 years of experience supporting Health and Human Service (HHS) agency projects in states such as Alaska, Delaware, Iowa, Maine, Illinois, Ohio, Utah, Vermont, West Virginia, and Wyoming
- More than 25 years of experience providing project management services
- Experience leading large and diverse teams

### RELEVANT EXPERIENCE

#### BerryDunn (02/2018 to present)

Jason participates in a leadership capacity with several clients. He is currently focused on resource development, strategic planning, Advance Planning Documents (APDs), solicitations (i.e., RFQs, RFPs), large technology implementations, and vendor oversight.

#### – Iowa Department of Human Services (DHS)

*Medicaid Procurement of Acquisition Support Services (MES)*  
(04/2022 to present)

Jason is the program manager for BerryDunn's team assisting DHS with modernization and procurement acquisition support services, including visioning, researching, planning, and developing solicitations. Jason is currently leading BerryDunn's team with the development of a pharmacy RFP and supporting the development of several APDs.



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

*Medicaid Management Information System (MMIS) Modernization (09/2020 to present)*

Jason is the engagement manager for BerryDunn's team supporting HCS's MES modernization and procurement activities collaborating directly with HCS leadership. He is providing subject matter expertise, visioning, researching, and developing solicitations. Jason is also supporting the transition of services and vendor onboarding. He has led the team to develop an initial modernization strategy, the creation of an MMIS Systems solicitation, as well as the visioning, research, and development of an MMIS Fiscal Agent solicitation.

– **Delaware Department of Health and Social Services (DHSS) – Division of Medicaid and Medical Assistance (DMMA)**

*APD Consulting Services (06/2021 to present)*

As the senior analyst, Jason is a part of the team supporting the Delaware DHS tracking DHSS DMMA's APDs. In his role, Jason provides senior level input and design in the drafting of APD documents, MDBT files, as well as updates to federal guidance. In addition, he helps identify and track project risks, issues, decisions, and action items for state leadership. Jason continues to provide support in a training and oversight capacity, specifically focused on APD financials.

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

*Enterprise Program Management Office (EPMO) (11/2018 to present)*

Jason supports the engagement as a subject matter expert (SME) in several operational areas:

- Strategic planning
- Resource management and tracking
- Budget and scope development
- Project management methodology and standards
- Medicaid Information Technology Architecture (MITA) and Medicaid Management Information Systems (MMIS) APD updates, maintenance, and forecasting (multiple iterations)

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

Jason served multiple roles on this successfully completed project, including as an EVV SME and as the implementation project manager. As project manager, Jason assisted BMS with the implementation of their overall EVV solution, which included strategic planning, requirement development, stakeholder engagement, solicitation development, APD and financial funding, evaluation support, vendor onboarding, and CMS certification support.

**Northern New England Diagnostics (02/2017 to 08/2017)**

As chief of operations, Jason developed client implementation process/strategy, created detailed plans for new client onboarding and key issues, and oversaw all operational staff, internal systems, and business processes. Jason was also responsible for performing staff and operational assessments regarding quality and production, developing staff training and mentoring plans for development and quality improvement, and ensuring services met quality and cost effectiveness standards. Jason created and maintained profit and loss (P&L) financials and associated data models to assist with client valuation and forecasting.

**Change Healthcare (formerly Goold Health Systems / Emdeon) (11/2005 to 02/2017)**

In his time at Goold Health Systems, Jason held several positions including:

*Senior Director of Pharmacy Administration Services*

In this role, Jason continued to build relationships and further integration into the organization's centralized operations and processes. He worked closely with GM/VP on business and operational initiatives and was responsible for the oversight of 17 management and administrative positions



(over 160 staff members).

*Vice President of Administration*

Jason developed company-wide initiatives to increase operational and deployment efficiencies and served as the account manager, project manager, implementation manager, or other lead roles in key projects as needed. He participated in contract negotiations, lease negotiations, and the establishment of remote offices as required. Jason also reviewed project plans and resources for company-wide projects and ensured sufficient staffing levels and resources. In addition, Jason managed the business development function and staff, pursued strategic opportunities in collaboration with the CEO and business development team, and assisted with and oversaw the development of cost estimates, timelines, scope, project plans, and proposal responses.

*Director of Administrative Services*

Jason planned, organized, assigned, directed, and evaluated the activities of the department. He also assisted the CEO in contract adherence, contract negotiations, lease negotiations, and hiring processes. He worked with the business development director in the development of cost estimates, timelines, scope, project plans, and proposal responses. Additional responsibilities included overseeing facility leases, maintenance, construction, and expansion as needed.

*Strategic Project Manager*

In this role, Jason was responsible for the direction, coordination, and completion of assigned strategic projects. He also assisted with business development and RFP responses, developed and implemented project management tools and tracking methods, and managed administrative office and project staff members.

Some of Jason's major projects included:

*Ohio Medicaid PBM and Rebate Services (04/2016 to 02/2017)*

Jason served in several capacities on the Ohio project including business development, project leadership and tactical project management. He served as part of the proposal team to develop the project management approach, cost proposal and payment milestones. Working with senior leadership, Jason oversaw much of the project activities including the establishment of a remote office, developing project and operational teams and coordinating on-site staff. During the project, the named Implementation Manager left the organization and Jason stepped into the named implementation role to help successfully deliver the systems. As part of his role, Jason oversaw project deliverables, requirement management, collaboration between multiple internal and external teams, meeting facilitation and client relations.

*Vermont Department of Vermont Health Access PBM (06/2014 to 07/2015)*

Jason provided leadership support for project management oversight, contract negotiation, supervised the implementation of all PBA activities, staff management, and SLA performance. Jason also served as the initial client escalation point.

*Illinois Medicaid PBM and Rebate Services (03/2014 to 03/2016)*

As the lead Implementation Manager, Jason oversaw all aspects of the project including proposal preparation, local facility planning, project team meetings, requirement management, joint application design sessions, meeting facilitation, coordination of multiple internal and external stakeholders including regular client meetings. He maintained the open action item logs, risk management, project plan updates and monitored progress daily.

*Iowa Medicaid Enterprise PBM (04/2012 to 10/2013)*

Jason led the re-procurement effort to plan and deploy updated software for this existing client. This included interacting at all levels internally and with the client to establish expectations, capture requirements in alignment to their CMS strategy, and develop key project deliverables. In



addition, Jason coordinated the efforts of SMEs in the development of artifacts, client reviews, meeting facilitation and regular updates with client and corporate management.

*Utah CMS Certification Support (2012)*

Following the successful deployment of software and services, Jason worked with the client to develop strategies for CMS certification, creation of CMS artifacts and guidance on approach. As this was software as a service, Jason provided support to the client through the CMS process and the client worked directly with CMS. The systems were successfully certified without any citing or revisions.

*Utah Medicaid POS/DRMS (POS and Rebate) (03/2011 to 10/2011)*

Jason served as the Implementation Project Manager for this multi-part project. In this role, Jason led a team of technical and business staff members to deliver a complex set of software and services. This included pricing and submission of cost proposals, client and payment strategy, project oversight and management, meeting facilitation, risk and issue management, report management and client engagement. This project also included more intensive training of state staff and product education, change request management and issue resolution.

*Wyoming Medicaid Pharmacy Fiscal Agent and PBM Services (06/2008 to 05/2009)*

As the Project Manager, Jason worked closely with internal business leads and the client to refine the proposed project plan and implementation strategy. He led requirement validation sessions with business leads, client stakeholders and the incumbent vendor. Typical project activities included meeting facilitation, requirement, risk and action item management. Jason also created a CMS certification and strategy document and subsequently worked with CMS, the client and business SMEs to successfully help certify the system.

*Maine Medicaid Mailroom and Business Process Outsourcing (HCFA, UB, ADA) and Medical Prior Authorization*

Jason served as internal project executive to manage the conversion of an existing sole-source contract to a sub-contract and establish a new department within the company. In this role, Jason participated in negotiations with several potential prime vendor partners to develop pricing and a successful bid strategy. After source selection, he worked with a new partner to define operational processes, quality standards and technical integration. New office space and hiring was completed successfully. Jason served as the implementation lead and the business unit manager for the new and existing services as part of this project, including staff management, quality oversight, and vendor/client relations.

*Drug Rebate*

Jason served as the senior manager for the Drug Rebate department to provide executive oversight and serve as the client point of escalation. Jason assisted Rebate managers and team leads to resolve staffing or prioritization issues, review and improve internal processes, and collaborated with the Rebate team to solve operational and implementation issues across all clients.

**Ingersoll-Rand (03/1998 to 11/2005)**

As a mechanical engineer, Jason served as a team leader for Laboratory Operations & Reliability. In this role, he managed operations and reliability efforts through direct reports and matrixed team. He created project plans and provided daily management and guidance of both lab and engineering personnel to ensure timely completion of assigned tasks. Projects included directing company-wide reliability efforts to deal with issues relating to new product development, and working with engineering and Underwriter's Laboratory (UL) to successfully list IRs 70kW product.



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## **PUBLICATIONS**

- Co-Presenter - Standardization of Medicaid Enterprise System (MES) Modernization Strategic Planning Frameworks, Processes, and Tools, and its Value to States, Presentation for Medicaid Enterprise Systems Conference (MESC) 2022, 8/18/2022





## Jeffrey “Jeff” Stoddard, Prosci® CCP

SENIOR MANAGER

Berry, Dunn, McNeil & Parker, LLC

### EDUCATION AND CERTIFICATIONS

BS, Management of Information Systems, University of Vermont

Prosci® Certified Change Practitioner

Health Leadership Development Program, Daniel Hanley Center for Health Leadership

### PROPOSED PROJECT ROLE

General Project Manager

### MEDICAID EXPERIENCE

5 years

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

### KEY QUALIFICATIONS

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

### PROJECT EXPERIENCE

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

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

#### **– Minnesota Department of Public Safety Driver and Vehicle Services (DVS)**

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

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

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

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



– **Portland Public Schools, ME**

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

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

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

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

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

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

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

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

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

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

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

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

*System Development Life Cycle (SDLC) Coordination Project (06/2024 to present)*

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

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

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

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

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

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

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

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

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

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

*Medicaid and Children's Health Insurance Program (WVCHIP) Enterprise System (MCES)*

*Procurement Assistance Project (06/2020 to present)*

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



## M. Joy Prenger

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

### EDUCATION AND CERTIFICATIONS

BS, Accounting, Columbia College (*in progress*)

State of Missouri Certified Project Manager

International Fuel Tax Association (IFTA) Board Member from 2014 to June 2018

Member of the Carrier One-Stop Shop team that received the 2002 Governor's Award for Quality and Productivity; 2010 Governor's Award for Customer Service and received High Achiever award to re-write the division's administrative rules.

### PROPOSED PROJECT ROLE

General Project Manager

### MEDICAID EXPERIENCE

7 years

Joy is an experienced business analyst, with demonstrated success responding to shifting business needs and priorities in a systematic and effective way. She brings 25 years of leadership experience from the Missouri Department of Transportation (MoDOT) and is well versed in government processes and organizational structure, budget management, business plans and strategies.

### KEY QUALIFICATIONS

- More than 20 years leading a team through effective delegation, training, and motivation. Skilled in team and conflict management
- 13 years of experience working with Sage 300 Accounting software for collections and disbursements exceeding \$195 million annually
- Six years serving as a board member for the International Fuel Tax Association Inc. (IFTA), actively participating in the simplification of the administration of motor fuels and use taxation reporting in the United States and Canada
- Testing experience on complex projects with multiple software solutions advancing transportation infrastructure for the commercial motor carrier industry
- More than 10 years of knowledge in program evaluation and review techniques (PERT), performance measurement and strategic planning, customer relationship management (CRM), and financial and logistic solutions
- Extensive knowledge of statutory and regulatory compliance for State and Federal requirements for the commercial motor carrier industry
- Six years of experience as a Goldschmidt Cancer Center volunteer working in admissions, medical records, information desks, and patient navigation for radiation and infusion treatments



## PROJECT EXPERIENCE

### **BerryDunn (10/2018 To Present)**

Joy works with BerryDunn's Medicaid Practice Group (MPG), supporting BerryDunn's State Medicaid and Health and Human Services (HHS) clients.

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

*PR APD Service Area Lead (06/2023 to present)*

*PR Operational Reporting Workbook (ORW) Subproject (06/2024 to present)*

Joy serves as the service area lead for the PR APD as well as PR ORW.

*Enterprise Objective Monitoring and Control (EOMC) Services (01/2021 to 05/2023)*

Joy supported BerryDunn's PR EOMC Services as a subject matter expert.

#### **- Iowa Health and Human Services (HHS)**

*Acquisition and APD SME (04/2022 to present)*

Joy supports Iowa's single state Medicaid agency as an acquisition and APD SME.

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

*Program Integrity Project (11/2018 to 10/2022)*

*Enterprise Data Warehouse (EDW) Project (11/2018 to 10/2022)*

*Electronic Visit Verification (EVV) Project (11/2018 to 10/2022)*

Joy's support of the above projects with DSS, the agency that administers Missouri's Medicaid program, included capturing supporting evidence for certification checklists in support of CMS certification R2 review; serving as UAT test lead supporting and resolving technical inquiries of the team and guiding them in the delivery of properly executed test cases; and developing test execution metrics, and defect management.

### **Missouri Department of Transportation (11/1992 to 07/2018)**

Joy oversaw the collection and distribution of daily accounts receivable and accounts payable activities in excess of \$195 million annually for IFTA, International Registration Plan (IRP), Unified Carrier Registration (UCR), Operating Authority (OPA), Oversize - Overweight (OS/OW), and Safety and Compliance. She researched, performed tests and monitored system issues for numerous customer transactions to ensure credential issuance, revenue recognition, and adaptation to changing regulatory environments. In addition, she developed and enforced financial, international, national and state motor fuel tax and apportioned registration policies and procedures for the division; worked with internal and external auditors and program compliance review teams to ensure compliance and cooperation with all request; and delegated authority to vote, respond and review ballot proposals for IFTA and the IRP that regulate commercial motor vehicle and safety business practices.



## Katie Gray, MBA, PMP®, LSSGB

MANAGER

Berry, Dunn, McNeil & Parker, LLC



### EDUCATION AND CERTIFICATIONS

MBA, School of Business,  
Simmons University

BA, Gender and Cultural  
Studies, Simmons  
University

Augsburg University,  
Center for Global  
Education and Experience  
Latin America Program,  
Mexico and Guatemala,  
Study Abroad

University of Cordoba,  
Spain, Language and  
History Program, Study  
Abroad

Certified Project  
Management

Professional® (PMP®)

Lean Six Sigma Green  
Belt (LSSGB)

### PROPOSED PROJECT ROLE

General Project Manager

### MEDICAID EXPERIENCE

12 years

Katie Gray is a manager in BerryDunn's State Government Practice Group with more than 20 years of experience in healthcare administration, health information technology (HIT), interoperability, and data analytics. Katie has national expertise in health information exchange (HIE), clinical and public health data systems, measurement, privacy, and compliance. Katie is experienced in strategic planning and project management, specializing in healthcare operations and technology implementation.

### KEY QUALIFICATIONS

- Experience leading health information services, excelling in private and public clinical data interoperability and software development
- National advisor for social determinants of health data interoperability and data governance

### PROJECT EXPERIENCE

#### BerryDunn (12/2021 to present)

– Guam Department of Public Health and Social Services (DPHSS)  
*Enterprise Portfolio Management Office Project (11/2024 to present)*

Katie supports the Enterprise Portfolio Management Office Project sub-project for interoperability and HIE. Katie supports DPHSS with information technology and interoperability advisory services, performing a needs assessment, and all other requests as a subject matter expert (SME).

– United States Virgin Islands (USVI) Department of Human Services  
*Enterprise Portfolio Management Office Project (10/2024 to present)*

Katie supports the Enterprise Portfolio Management Office Project, which provides project planning and engagement oversight, organizational development support services, Medicaid program and certification support, outcomes-based Medicaid Information Technology Architecture (MITA) State Self-Assessment (SS-A) support, and business process redesign and policy support. Katie supports the enterprise with information technology advisory services as a SME.



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

*HIT/HIE Support Services (12/2021 to present)*

Katie is serving as deputy program manager to assist PRDoH and Puerto Rico Medicaid Program (PRMP) with planning and implementation of a health data utility (HDU) HIE. Services provided by the BerryDunn team include performing an HIT assessment and developing recommendations. Following the assessment, BerryDunn continues to perform the strategic HIT/HIE roadmap to help ensure a sustainable HDU/HIE for Puerto Rico. In addition, BerryDunn is providing project management services for HIE planning and implementation activities, and other support such as developing Advanced Planning Documents (APDs) to request funding from Centers for Medicare & Medicaid Services (CMS), and a strategic plan for public health interoperability.

– **Ohio Mental Health and Addition Services (OhioMHAS)**

*Electronic Health Record (EHR) Integrator Project (05/2023 to 11/2024)*

Katie served as the project manager to provide oversight, management, and support to OhioMHAS and its EHR vendor Epic Systems Corporation implementation across Ohio's six state run psychiatric hospitals. The BerryDunn team participated in the core project activities, reviewed vendor deliverables, performed project governance, risk and issue management, and multiple organization assessments including current state, risk, and change readiness, in support of a successful best-practice EHR implementation.

– **Connecticut Department of Administrative Services/Bureau for Enterprise Services and Technology (DAS/BEST)**

*Child Support Enforcement IV&V (01/2023 to 01/2024)*

Katie is served as a business analyst for this project to provide IV&V periodic reviews for Connecticut's implementation of a new child support enforcement system. The BerryDunn team observed project activities, reviewed vendor deliverables, documented findings, and provided recommendations for correcting any weaknesses identified during the semi-annual reviews.

– **Alaska Department of Health (DOH)**

*HIE Planning and Procurement (01/2022 to 09/2023)*

Katie served as a SME for this project to assist DOH with re-procuring HIE services and associated technologies. The BerryDunn team performed an initial high-level assessment to gain an understanding of the vision, needs, and desires for the future HIE to inform requirements and Request For Proposal (RFP) development, performing market research to understand available vendors, solutions, and technologies in the marketplace, defining HIE business and technical requirements, developing an RFP using the best-value process, providing oversight for the solicitation process, and providing post-solicitation services, such as vendor onboarding and ongoing contract management/quality assurance.

**HealthInfoNet (Maine's Statewide HIE) & Cureous Innovations (5/2013 to 06/2021)**

As Director of Client Operations and Programs, and compliance officer, Katie led the health information services company excelling in private and public clinical data interoperability and software development. Katie was accountable for client operations, contract development and execution, R&D grant development, and project oversight. She served as an advisor in data capture and aggregation for state, public health, private healthcare strategy, research, eCQI, value-based payment outcomes, and predictive analytics. Katie was responsible for partnership and contract management, business operations and development, and advisor and program development. Her primary responsibilities for each category are listed below.



#### – Partnership and Contract Management

Katie established and grew over 15 new partners per year, managing a total of 200 organizational partnerships across Maine's healthcare delivery systems, community health centers, and community-based organizations averaging \$5 million in revenue per year. Katie successfully directed four complex multiyear, multi-million, state and federally funded technology innovation grants in partnership with executives from Centers for Medicare and Medicaid Innovation (CMMI) and Health Resources and Service Administration (HRSA) with a focus in rural health and technology integration. Katie transitioned grant projects into an average of \$1 million in recurring revenue contracts with Department of Health & Human Services (DHHS) and the Veterans Affairs Administration. She sponsored five to eight multiyear information technology projects per year to help ensure technical specialists aligned with clinical strategy and public health goals. These projects delivered a suite of HIT core services and products ranging from patient record aggregation and access, and patient-level predictive analytics, to software implementations.

#### – Business Operations and Development

Katie led product design for functional clinical workflow across predictive analytics products and contracts. She led the partnership with health venture capital start-up (HBI Solutions, Inc.) to test and implement a new software solution for population health management for ACOs and care management services. After six years of successful implementation and sustainable user adoption, HealthInfoNet is now building its own suite of analytics services to complement HBI's predictive analytics solution and continue the partnership. Katie hired and led the company's first team to execute client outreach for new learning models in clinical education and technology support. She achieved average annual growth of 60% in clinician adoption for six consecutive years. Katie managed data privacy compliance as designated by Maine State and federal law. She wrote company SOPs related to privacy and operations to comply with legal requirements. She wrote and led policy implementations for CMS hospital requirements for HIT.

#### – Advisor and Program Development

Katie led three statewide steering committees across DHHS, community organizations, healthcare providers, and patients to advance data collection and analysis efforts to inform policy decisions and legislative acts such as value-based care contracting programs. She advised Maine's DHHS on Medicaid (MaineCare) grant steering committees for children's health and innovation grants (2013-2018). Katie advised DHHS on statewide data collection and reporting for COVID-19 vaccination, treatment, and testing. Katie was the project director grantee for four years of the Robert Wood Johnson Foundation Data Across Sectors for Health (DASH) program. She successfully secured highly competitive annual funding to assess, advise, test, and implement community-based solutions to advance health data equity in complex social ecosystems. She consulted for multiple State Medicaid programs, community health collaboratives, and ACOs in data management strategies for DASH. Katie was a conference and webinar speaker for DASH as a health data expert. Katie was also project director for two statewide community-planning projects with funding from the Maine Health Access Foundation (MeHAF) to design patient choice for health data exchange. Katie presented at MeHAF as a national expert in patient choice and health data.

#### **MaineGeneral Health (2007 to 2013)**

As health system administrative director, Katie's primary responsibilities included being accountable for patient services, staff management, and physician administration as part of the executive leadership team of a large community healthcare delivery system. She was responsible for Primary Care, Geriatrics, Women's Health, and Urgent Care. Katie designed and operated large outpatient care facilities, including the new hospital the Alford Center for Health. As a member of



quality and policy committees for the system, Katie led quality, compliance, and policy standards for the Physician Administration division that were implemented across all physician practices. Katie integrated care management services and workflows to improve transitions of care. She increased gross revenue by 10% annually (\$50M revenue budget) while decreasing operational expenses by 5% (\$40M expense budget) over two years. Katie grew new Urgent Care revenue by over 50% within the first three years of operations while decreasing Emergency Department utilization of low acuity patient visits by 8%. These new practices increased growth by 22% in two years. Katie recruited and retained high-demand middle management positions. Katie was accountable for 50 medical staff positions and 180 staff FTEs.

#### **Dana-Farber Cancer Institute (2003 to 2007)**

As a care management resource specialist, Katie was a team leader within the acute care management department. Katie's primary responsibilities included performing complex case management for hematology (largest department in Institute), specializing in care plans for international bone marrow transplant patients. Under the direction of physicians, Katie created care plans for housing, transportation, insurance, pharmacy, and met with families and caregivers to manage the care plans throughout treatment lasting 6-12 months. She expanded patient services programs by growing housing partnerships with Boston hotels. During this role, Katie received the customer service excellence award for program improvements.





**Katie McDonald, MBA, PMP®,  
LSSGB**

SENIOR PARAPROFESSIONAL  
Berry, Dunn, McNeil & Parker, LLC



**EDUCATION AND  
CERTIFICATIONS**

MBA, Healthcare  
Administration, Marshall  
University  
BA, Communication  
Studies, focus on  
Organizational  
Communication, Marshall  
University  
Certified Project  
Management  
Professional® (PMP®)  
Lean Six Sigma Green  
Belt Certification (LSSGB)

**PROPOSED PROJECT  
ROLE**

General Project Manager

**MEDICAID EXPERIENCE**

3 years

Katie McDonald is a senior paraprofessional with extensive knowledge in communication skills, including collaborative engagement, professional presentations, superior-subordinate communication, intercultural communication, leadership and group communication, research, theory, and rhetoric. She has developed foundational knowledge in marketing principles, public relations, economics, sales, and workplace language. Through her work, she has refined superior organizational skills, detail-oriented problem-solving abilities, and has become a successful, confident communicator. She is particularly adept at supporting and promoting collaborative communication processes, streamlining solutions, enhancing process awareness and engagement, and developing and reviewing project-specific documentation such as deliverables, presentations, and business process improvement flows. Katie works with state Medicaid agencies throughout the entire project life cycle, from project planning and development/implementation to closeout, to help states and agencies achieve successful project outcomes.

**KEY QUALIFICATIONS**

- Extensive experience with drafting review cycles, and submission of key client service deliverables, including executive and CMS status reports, Scopes of Work (SOWs), Advance Planning Documents (APDs), and Requests for Proposals (RFPs)
- Three years of expertise in cultivating, coordinating, and managing relationships between interested and invested parties to help secure successful project outcomes

**PROJECT EXPERIENCE**

**BerryDunn (05/2022 to present)**

– United States Virgin Islands Department of Human Services  
Enterprise Portfolio Management Office (EPfMO) Project (09/2024 to present)

Katie serves as deputy project manager for the EPfMO project. Katie provides project management support with planning and developing deliverables. Katie helps with preparing presentations and developing and reviewing project deliverables for various project-related activities and tasks.



– **Delaware Department of Health and Social Services (DHSS), Division of Medicaid and Medical Assistance (DMMA)**

*APD Consulting Project (05/2024 to present)*

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

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

*Partnership Management (12/2023 to present)*

Katie provides project coordination assistance to DoHS, supporting planning, developing, and management of the Multistate Collaborative Meeting and various tasks for the Leverage and Reuse process for the USVI and Guam. Katie helps with preparing presentations and developing and reviewing project deliverables for various project-related activities and tasks.

*People's Access to Help (PATH) Design, Development, and Implementation (DDI) Project Management (03/2023 to 11/2024)*

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

*Department of Justice (DOJ) Agreement Implementation Plan (05/2022 to 07/2024)*

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

*PATH Minimum Acceptable Risk Standards for Exchanges (MARS-E) Security Assessment (11/2023 to 03/2024)*

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

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

*Medicaid Information Technology Architecture (MITA) 3.0 State Self-Assessment (SS-A)*

*Maintenance and Annual Update Assistance Project (07/2023 to present)*

Katie assists with MITA life cycle maintenance activities, including developing new business process improvement flows and updating MITA related reports.

*APD Assistance (05/2023 to present)*

Katie provides business analyst assistance with APD budgets and narratives. Katie previously provided project coordinator assistance with planning, developing, and helping to manage the APD funding process. Katie has also helped with preparing presentations and developing and reviewing project deliverables for various project-related activities and tasks.

*IT Control Environment Review (07/2024 to 11/2024)*

Katie provided project coordination assistance in with planning, developing, and helping to manage the review of the BMS IT control environment. Katie helped with developing and reviewing project deliverables for various project-related activities and tasks.

*Provider Management Support Project (08/2023 to 10/2023)*

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



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**Sedgwick Claims Management Services (08/2017 to 05/2022)**

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



**Lauren McTear, Prosci® CCP**

SENIOR MANAGER  
Berry, Dunn, McNeil & Parker, LLC



**EDUCATION AND CERTIFICATIONS**

BS, Business Technology and Management, Vermont Technical College  
Prosci® Certified Change Practitioner

**PROPOSED PROJECT ROLE**

General Project Manager

**MEDICAID EXPERIENCE**

7 years

Lauren McTear is a senior manager in BerryDunn's State Government Practice Group and leads the Health and Human Services (HHS) Technology Advisory Services Practice. She has more than 15 years of experience with large-scale system planning and implementation projects. Lauren is highly skilled in modeling relationships among organizational structures, business processes, information flows, and IT systems to identify opportunities for reform and inform strategic planning.

**KEY QUALIFICATIONS**

- Former Vermont Agency of Human Services Business Process Director
- Deep understanding of HHS and HIT operations and systems
- Experience with project management, strategic planning, business process analysis, and procurement
- Technical expertise in system architecture, integration, and development

**PROJECT EXPERIENCE**

**BerryDunn (11/2017 To present)**

- Iowa Department of Health and Human Services (IA HHS) SNAP/FIP/RCA System Procurement (10/2024 to present)

Lauren is serving as the project manager to assist HHS and the Iowa Department of Management with the procurement of a new Supplemental Food Assistance Program (SNAP) and Temporary Assistance for Needy Families (TANF) eligibility system. The BerryDunn team is developing a scope of work for the request for proposal, a cost proposal template, and a requirements traceability matrix with a set of functional and technical requirements provided by IA HHS. The team is also assisting with responding to vendor questions and supporting the proposal evaluation process.

- New Mexico Health Insurance Exchange (NMHIX) IV&V Services (06/2024 to present)

Lauren is serving as an engagement manager to provide IV&V services for NMHIX's implementation of a state-based health



insurance marketplace and contact center. The BerryDunn team is observing project activities, reviewing vendor deliverables, documenting findings, and providing recommendations to improve project success.

– **Ohio Department of Developmental Disabilities (DODD)**

*Electronic Health Record (EHR) Project Management Services (02/2024 to present)*

Lauren is currently serving as an engagement manager for this project to provide project management, business analysis, and organizational change management (OCM) services in support of DODD's EHR implementation across eight developmental centers. The BerryDunn team is performing a current state analysis, establishing project management processes and tools, and conducting change readiness assessments, and developing an OCM plan.

– **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)*

Lauren is currently serving as the engagement manager for this project to provide quarterly IV&V reviews for Maine's implementation of a new child care management system. The BerryDunn team is observing project activities, reviewing vendor deliverables, documenting findings, and providing recommendations for correcting any weaknesses identified during the quarterly reviews.

– **Connecticut Department of Administrative Services/Bureau of Enterprise Services and Technology (DAS/BEST)**

*Child Support Enforcement IV&V (10/2021 to present)*

Lauren is currently serving as the project manager for this project to provide semi-annual IV&V reviews for Connecticut's implementation of a new child support enforcement system. The BerryDunn team is observing project activities, reviewing vendor deliverables, documenting findings, and providing recommendations for correcting any weaknesses identified.

– **Ohio Department of Mental Health and Addiction Services (OhioMHAS)**

*EHR Integrator Project (05/2023 to 11/2024)*

Lauren served as the engagement/program manager for this project to provide oversight, management, and support to OhioMHAS and its EHR vendor, Epic Systems Corporation, implementation across Ohio's six state run psychiatric hospitals. The BerryDunn team participated in the core project activities, performed project status reporting and risk/issue management, and conducted multiple organization assessments including current state and change readiness in support of a successful best-practice EHR implementation.

– **Vermont Agency of Digital Services (ADS)**

*Independent Reviews (10/2018 to 05/2023)*

Lauren has served as the project manager and subject matter expert 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 readiness to implement the systems. As the project manager, Lauren was responsible for identifying risks, facilitating discussions with the State on risk mitigation strategies to help ensure project success, and presenting findings and recommendations to the CIO.

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



- Department of Environmental Conservation, Agency of Natural Resources, Revolving Fund System Replacement Project (02/2023 to 05/2023)
- Department of Labor (DOL), Unemployment Insurance Modernization Project (02/2023 to 05/2023)
- Vermont Cannabis Control Board, Licensing System Project (07/2022 to 08/2022)
- AOE, Innovative Statewide Summative Assessment Project (04/2022 to 08/2022)
- Department of Vermont Health Access (DVHA), 5% Co-Pay Project (03/2022 to 05/2022)
- DVHA, Transformed Medicaid Statistical Information System (T-MSIS) Project (12/2021 to 02/2022)
- DOL, Workers' Compensation System Modernization Project (11/2021 to 01/2022)
- DVHA, Medicaid Management Information System Interoperability Platform Project (10/2021 to 11/2021)
- Department of Liquor and Lottery, Licensing and Enforcement System Project (10/2020 to 12/2020)
- AOE, Child Nutrition Management System Project (04/2020 to 06/2020)
- Agency of Human Services, Electronic Medical Record Implementation Project (01/2020 to 05/2020)
- Department for Children and Families (DCF), Child Development Division Informational System Project (02/2020 to 03/2020)
- Department of Corrections (DOC), EHR Implementation Project (02/2020 to 03/2020)
- DVHA, Premium Processing Platform Project (01/2019 to 03/2020)
- DVHA, Integrated Benefits Services Project (01/2019 to 04/2019)
- DVHA, Vermont Clinical Registry (VCR) Enhancement Project (11/2018 to 04/2019)

– **Mississippi Department of Mental Health (DMH)**

*EHR Consulting Project (12/2023 to 04/2024)*

Lauren served as the engagement manager for this project to assess the EHR needs of the 11 Community Mental Health Centers (CMHCs), research existing behavioral health EHRs, make a recommendation as to what the industry's best-practice solution is to improve interoperability and streamline billing capabilities. The BerryDunn team also developed EHR system requirements and specifications that DMH can use for a future procurement.

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

*HIT/Health Information Exchange (HIE) Support Services (04/2020 to 04/2024)*

Lauren served as an engagement manager for this project to assist PRDoH with strategic planning and implementation of an HIE. Services provided by the BerryDunn team include performing an HIT assessment and developing recommendations and an HIT roadmap to help ensure successful establishment of the HIE. In addition, BerryDunn provided project management services for HIE planning and implementation activities and developing Advanced Planning Documents to request funding from Centers for Medicare & Medicaid Services.

– **Mississippi Department of Human Services (MDHS)**

*Legacy Systems Assessment Request for Proposal (RFP) Development (07/2022 to 03/2024)*

Lauren served as the engagement manager for this project to assist MDHS with developing an RFP



to procure systems integrator and design, development, and implementation (DDI) services for modernizing MDHS' SNAP, TANF, Child Care, and Child Support Enforcement systems. Lauren supported MDHS during the vendor question and answer period during the open procurement during proposal evaluations.

*Legacy Systems Assessment and IT Feasibility Study (08/2021 to 06/2022)*

Lauren served as the engagement manager for the BerryDunn team performing a feasibility study for modernizing MDHS' SNAP, TANF, Child Care, and Child Support Enforcement systems. The team was responsible for performing an assessment of five legacy systems, conducting an alternatives analysis, developing functional and technical requirements, leading the development of a cost benefit analysis, and developing a conceptual systems design.

**– Alaska Department of Health (DOH)**

*HIE Planning and Procurement (08/2021 to 09/2023)*

Lauren served as engagement manager for this project to assist DOH with re-procuring HIE services and associated technologies. The BerryDunn team performed an initial high-level assessment to gain an understanding of the vision, needs, and desires for the future HIE to inform requirements and Request for Information (RFI) development, performed market research to understand available vendors, solutions, and technologies in the marketplace, defined HIE business and technical requirements, developed an RFP using the Best-Value process, provided oversight for the solicitation process, and provided post-solicitation services, such as vendor onboarding and ongoing contract management/quality assurance.

**– Connecticut Department of Children and Families (DCF)**

*Adoption/Guardianship Needs Assessment Project (05/2021 to 08/2021)*

Lauren served as the project manager for the BerryDunn team performing a current assessment of DCF's adoption and guardianship programs. Project activities included evaluating strengths and challenges in the current business and technical environment, developing findings related to gaps between the current environment and DCF's desired future environment, and providing recommendations to address the gaps, which will serve as a roadmap to help DCF achieve its desired future environment vision and goals.

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

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

Lauren served as project manager for the BerryDunn team performing a current environment assessment and gap analysis for MDHHS' disease surveillance system. Key activities included facilitating fact-finding sessions and business process mapping sessions to gain an understanding of the challenges in the current environment and the vision and needs for the desired future environment, performing a gap analysis, and providing recommendations for MDHHS' disease surveillance system modernization efforts.

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

*Data System Assessment (08/2019 to 07/2020)*

Lauren was the project manager for this project to assess the current MCH data systems and end user applications, identify gaps and make recommendations, and develop requirements to enable the MCH Division to procure services and solutions needed to meet future data systems' needs. These needs include but are not limited to HIE systems interoperability; robust Extract, Transform, and Load (ETL) processes; provider access and information sharing, and data management as it relates to Title V block grant MCH national performance measures and State of Indiana-specific



initiatives.

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

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

Lauren served as the project manager overseeing the development of a current state assessment of Child Welfare systems impacted by the Family First Prevention Services Act (FFPSA) and the management of sub-projects to help West Virginia's implementation of the FFPSA.

*Eligibility and Enrollment Implementation Assistance (11/2017 to 10/2018)*

As requirements management lead, Lauren provided project management services through the requirements analysis, system DDI phases of this project to help ensure the requirements are representative of the agreed-upon solution. Her responsibilities included providing SNAP, TANF, and Medicaid subject matter expertise, directing team members in assignments, tracking progress of activities to completion, attending meetings related to the requirements and design phases of the project, status reporting to the State, and maintaining consistent communications with key vendor staff throughout the project.

**Vermont Agency of Human Services (AHS) (10/2007 to 11/2017)**

**– Agency Business Process Director (10/2014 to 11/2017)**

Lauren translated business strategies and objectives into capabilities, including the traceability of strategy to capabilities and processes. She modeled how federal and state programs/services, operations, and systems interoperate within the AHS. Lauren developed and maintained artifacts such as system assessments, multiyear cost models, and security assessments; and performs analysis, evaluation, planning, design, and implementation of the AHS enterprise systems. She also created system selection documents for IT products or services – statements of work, RFP, and Technical Services Contracts. In this role, Lauren was engaged in analysis activities for identifying opportunities and/or constraints for replacing legacy systems supporting programs in the Departments of Vermont Health Access (State Medicaid agency), Children and Families, Aging and Independent Living, and Vermont Department of Health.

**– Department for Children and Families Technical Lead (10/2007 to 10/2014)**

Lauren served as technical lead for AHS' projects with concentration on systems integration design. She developed technical strategies to support project objectives, led systems developers and business analysts on large and complex IT projects, and oversaw IT vendors to help ensure adherence to established IT processes, standards, and best practices. In addition, she collaborated with business and architecture stakeholders to help ensure technology strategies are aligned within context of portfolio and project planning, and coordinated the approval process for technical, system, and security documentation. Lauren also served as systems developer helping to prioritize Department and Agency IT projects based on strategic goals.





## Bill Richardson, MHA, PMP®, Prosci® CCP, ITIL (F)

PRINCIPAL

Berry, Dunn, McNeil & Parker, LLC

### EDUCATION AND CERTIFICATIONS

MHA, University of  
Minnesota, School of  
Public Health

BS, Business, University  
of Minnesota, Carlson  
School of Management  
(Major: Management  
Information Systems,  
Minor: Political Science)  
Information Technology  
Infrastructure Library  
(ITIL) Foundation  
Certification

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

Prosci® Certified Change  
Practitioner

### PROPOSED PROJECT ROLE

General Project Manager

### MEDICAID EXPERIENCE

19.5 years

Bill Richardson is a principal in BerryDunn's Medicaid Practice Group, presenting with over 20 years of experience providing program- and project-level management services for Medicaid program, policy, and enterprise system projects. Bill has deep knowledge and experience both within the technical realm as a programmer and in the business and policy realm as an experienced professional with an enhanced focus on managing eligibility policy projects, Medicaid waivers, and State Plan Amendments (SPAs).

### KEY QUALIFICATIONS

- Over 20 years of Medicaid program and project management experience in 15 states, including GA, GU, HI, MA, MN, MO, MS, NC, ND, NH, NM, OH, PR, VI, and WV
- 10+ years of experience providing direct support to single state Medicaid agencies

### PROJECT EXPERIENCE

#### BerryDunn (04/2011 to present)

*Principal, Medicaid Practice Group (07/2018 to Present)*

As a principal, Bill manages the strategy and execution of a portfolio of engagements. He utilizes his Medicaid experience to guide and develop the team to meet client needs. His work includes helping teams create solutions tailored to the individual client that leverage industry best practice and evidence-based decisions. Bill helps ensure project teams consistently deliver quality results to satisfied clients. In addition, in the principal role, Bill combines his experiences to support BerryDunn initiatives such as BerryDunn's Healthcare Community of Practice, Innovation Council, Visioning Process, and Culture Team. In turn, he applies this experience to support client organizations.

– **Guam Department of Public Health & Social Services (DPHSS)**  
*Enterprise Program Management Office (EPMO) (01/2025 to Present)*

Bill and BerryDunn's Medicaid policy team currently provide consulting services to the Guam DPHSS, Guam's single state Medicaid agency.



Currently, this work includes supporting Guam in assessing their State Plan as it relates to changes to the reimbursement for pharmacy services.

– **United States Virgin Islands Department of Human Services (VIDHS)**

*Enterprise Portfolio Management Office Project (10/2024 to Present)*

Bill currently serves as a Medicaid policy SME and oversees BerryDunn's Medicaid policy related work for BerryDunn's work in the United States Virgin Islands for the VIDHS, USVI's single state Medicaid agency. In a SME capacity, Bill is helping the USVI assess options for Medicaid buy-in for the USVI. In his oversight role, Bill helps ensure that BerryDunn brings the resources and expertise necessary to support the USVI's policy initiatives and helps this USVI manage compliance. Some of this work includes Section 5121 implementation, implementation of DRG payment methodology for off-island care, and general support for the SPA process.

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

Bill currently serves as the contract manager for two projects supporting Minnesota's Department of Human Services, MN's single state Medicaid agency. He also served in that role for a project that has been completed. In this role, Bill helps ensure staff with the right experience support MN, the quality of BerryDunn's work, and MN's satisfaction with BerryDunn's support. These projects include:

- *Research Studies for Contingency Management Services (05/2024 to Present)*
- *1115 Waiver for Justice-Involved Individuals (02/2024 to present)*
- *Program Analysis of Implementation of a PACE Program (09/2023 to 06/2024)*

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

*Enterprise Objective Monitoring and Control (EOMC) Services (07/2019 to Present)*

Bill serves as the contract manager and engagement principal in BerryDunn's partnership with PRMP under the PR Department of Health, PR's single state Medicaid agency, as it transforms its Medicaid enterprise. BerryDunn's EOMC services span from Medicaid policy and program transformation to program management across PR's Medicaid enterprise. BerryDunn has helped PR complete strategic planning for its Medicaid Enterprise System road map, improve the management of contracts and advanced planned documents (APDs), complete certification of multiple modules such as integrated eligibility system (IES), and transition aspects of operations from system vendor staff to the PRMP staff. In addition to Bill's contract management focus, he focuses his content knowledge on supporting the Medicaid program and policy. Some example projects include:

*State Plan Amendments and Compliance*

BerryDunn supports PR in maintaining its State Plan by reviewing SPA needs, reviewing related regulatory and sub regulatory guidance, drafting SPAs and public notices, and submitting SPAs. BerryDunn's work includes collaborating with Administración de Seguro's de Salud (ASES) to help ensure that Managed Care Organization (MCO) contracts and the State Plan are in alignment. Further, BerryDunn works with PRMP to bring the State Plan up to date, including navigating the difference in funding and regulatory compliance for a territory as compared to states.

*Federally Qualified Health Centers (FQHC) Payment Methodology Assistance*

As PR navigated reimbursement rates for FQHCs, BerryDunn assisted PRMP in assessing options for rates for FQHCs. The work included identifying rates, assessing options for re-baselining rates, and assisting PR with options for documenting PR's approach to reasonable costs.

*Money Follows the Person (MFP) Grant Application and Assessment*

Puerto Rico sought to leverage the MFP grant to assess opportunities for expanding Long Term Services and Supports (LTSS) services in Puerto Rico. BerryDunn supported Puerto Rico's



successful grant application and follow-on assessment work to support the awarded grant. BerryDunn worked with both PR and Centers for Medicare & Medicaid Services (CMS) to navigate the successful grant application despite PR not covering institutional long term care services.

#### *LTSS Financial Analyses*

As PR sought to secure funding through Congressional action, Bill and the BerryDunn team created financial estimates for funding needs for PR to support expanding Medicaid services to cover LTSS in PR.

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

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

Bill currently serves as the contract manager and project principal for the OMES independent verification and validation (IV&V) engagement with Ohio's single state Medicaid agency. BerryDunn is helping ODM ensure a modular approach and implementation along with governance that will work for Ohioans and support ODM's modular certification process. BerryDunn works to support the interest of both CMS and ODM in successfully completing program goals.

#### **– Ohio Department of Administrative Services (DAS)**

##### *Ohio Benefits Program IV&V Services (04/2021 to 07/2023)*

Bill served as the project principal and contract manager for the Ohio Benefits IV&V engagement. Through this work, BerryDunn supported DAS in addressing specific requirements of CMS during the operations phase of the Ohio Benefits program. DAS successfully transitioned away from IV&V in July of 2023.

#### **– Missouri Department of Social Services (DSS)**

##### *Missouri Medicaid Enterprise (MME) PMO Engagement (11/2017 to 07/2023)*

Bill served as the project principal and contract manager for the MME PMO project spanning multiple MO DSS divisions with MO's single state Medicaid agency. Key activities included partnering with the MME to support the implementation of a program integrity solution along with business intelligence (BI) and enterprise data warehouse (EDW) solution and supporting certification.

##### *Missouri Eligibility Determination and Enrollment System (MEDES) IV&V Services (07/2013 to 07/2023)*

Bill served as the project principal and contract manager for the MEDES IV&V engagement. As part of this project, BerryDunn served as an independent partner as MO implemented a new IES. This work included an initial implementation, transition to a new systems vendor, and transition to a third vendor for maintenance and operations. BerryDunn provided proactive risk and issue identification and management.

Bill has worked on additional projects with MO, including serving as project principal for MO's Electronic Visit Verification (EVV) procurement assistance project where BerryDunn helped MO's Medicaid agency develop an EVV Request for Proposal (RFP), along with the MO Medicaid IT governance assessment that seeks to help MO determine a governance model that will help the State transform its Medicaid enterprise.

#### **– West Virginia Children's Health Insurance Program (WVCHIP)**

##### *Assessment of ACA Compliance and Transition Project Management Support (10/2013 to 08/2015)*

Bill served as engagement manager overseeing the BerryDunn team evaluating needs associated with WVCHIP to help bring it into compliance with ACA requirements. This project included transitioning WVCHIP from its previous Third-Party Administrator (TPA) to a Medicaid Management Information System (MMIS).

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



*ICD-10 Transition Planning, Implementation, and Policy Remediation (03/2013 to 06/2015)*

Bill helped BMS, WV's single state Medicaid agency, initiate its ICD-10 compliance project, drafting the I-APD and developing the project schedule. Bill served as the project manager at the start of the project and continued to act as a project SME, supporting the process to update all policies to reflect ICD-10 codes.

*PPACA Planning, Analysis, and Implementation Support (04/2011 to 12/2013)*

Bill served as the project manager for the PPACA Planning Project, which gave shape to the ambiguous requirements of the ACA and provided management of projects that needed to come into compliance with the ACA, such as those aimed at enhanced payments for primary care providers and hospital-based presumptive eligibility.

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

Bill provided project management for the evaluation of proposals in response to BMS' DW/DSS RFP. This included developing evaluation packets for the evaluation committee.

Bill has worked on additional projects with BMS, including serving as project manager for some of WV's Health IT initiatives, assisting BMS with its PMO initiative, leading the development of an IV&V services RFP, and facilitating RAC vendor procurement evaluations.

**– New Mexico Human Services Division**

*Health and Human Services (HHS) 2020 Project Support (08/2016 to 06/2018)*

BerryDunn provided support to the HHS 2020 project—New Mexico's modular MMIS replacement project under its single state Medicaid agency. As the engagement manager, Bill brought his MMIS experience in support of project management and system architecture.

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

*Organizational and Business Process Redesign (07/2017 to 12/2017)*

Bill served in the role of program director for the eligibility business process redesign effort for the customer-facing sections of Hawai'i's MQD with Hawai'i's single state Medicaid agency. Duties included overseeing the work performed by BerryDunn's team, reviewing and approving all deliverables, being involved in key meetings with the MQD and State leadership, and helping to ensure the full commitment of BerryDunn to the engagement. Phase two of the project culminated in a findings and recommendations report that included recommendations for organizational transformation of eligibility offices and call centers.

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

*Eligibility and Enrollment Project Support Services (04/2013 to 04/2014)*

Bill provided oversight on the Eligibility and Enrollment project, which included analyzing the ACA impacts on Medicaid eligibility policy and facilitating the decision-making process and subsequent policy updates and SPAs. This project also included providing project management support for BMS as it implemented system upgrades and changes to comply with the new regulations and policy.

**ACS, A Xerox Company – Government Healthcare Solutions (06/2001 to 04/2011)**

**– ACS Health Enterprise Program**

As a systems delivery manager, Bill provided team leadership and implementation management for internal and client facing phases of the development and deployment of the ACS Health Enterprise system. Bill supported single state Medicaid agencies such as New Hampshire Department of Health and Human Services. In this role, he oversaw teams of business analysts, testers, and developers; directed the creation of an automation testing process to expedite testing of claim exceptions and reduce costs and risk; proactively identified risks and developed plans to mitigate risk and loss; led efforts to develop and document standard and repeatable processes for



use across the organization; and implemented a risk-based testing methodology to manage schedule constraints while maintaining deployment quality.

**– State of North Dakota's (ND) MMIS Project**

As a project manager and team lead, Bill was responsible for the business design of ND's largest-ever IT project. He developed and adapted processes to overcome challenges of deployment of the system under a new methodology; managed scope expectations by focusing on minimizing enhancements to the system; managed the creation of use cases and design artifacts; led the development of ND's requirements analysis document for all business functionality related to healthcare claims adjudication and payment; led the alignment of the ND deployment with the Medicaid Information Technology Architecture (MITA) Framework; and provided weekly maintenance of multiple work plans.

**– State of North Carolina LEADS Project**

As team lead, Bill was responsible for documenting requirements and a detailed system design for a multi-payer healthcare claims back-end processing system, including application of policy edits and audits. He authored business and technical designs to document system functionality in accordance with the State's goals; developed and maintained the project plan to manage project risks and management expectations; managed the process for systematically documenting existing claim audits, extracting, transforming, and loading (ETL) the audits into ACS format; and led the design of table-driven duplicate claim checking.

**– State of Mississippi's Envision Project**

As a consultant, Bill provided design, development, and unit testing of healthcare claims back-end processing modules. He documented and enhanced functionality based on change requests; modified utilization review and prior authorization healthcare claims processing modules; and documented processes based on client input and analysis of the State's legacy system.

**– State of Georgia's Health Partnership Project**

As an analyst, Bill completed development and unit testing of non-inpatient healthcare claim pricing, editing, and mass adjustment modules.



## Nolan Cyr, MA

SENIOR CONSULTANT

Berry, Dunn, McNeill & Parker, LLC

### EDUCATION AND CERTIFICATIONS

Master's Certificate,  
Organizational  
Development, University  
of Southern Maine

MA, Leadership Studies,  
University of Southern  
Maine

BS, Leadership and  
Organizational Studies,  
University of Southern  
Maine

Certificate in Instructional  
Design and e-Learning,  
University of Georgia

### PROPOSED PROJECT ROLE

General Project Manager

### MEDICAID EXPERIENCE

3 Years

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

### KEY QUALIFICATIONS

- MA, University of Southern Maine, Concentration in Leadership and Organizational Development
- Supported the development of 50+ APD submissions across several states and territories, such as Delaware, Iowa, West Virginia, Puerto Rico, Alaska, Guam, and the U.S. Virgin Islands
- Experience defining strategic priorities, outcomes, and metrics for health and human service (HHS) agency projects in eight different states and territories
- Manages a team of nine resources

### PROJECT EXPERIENCE

#### BerryDunn (06/2022 to present)

– **West Virginia Bureau for Medical Services (BMS)**  
*Organizational Development Project Phase II (07/2024 to present)*  
As a business analyst, Nolan works with the content development team to help design, develop, and deliver training courses and programs through BerryDunn's Medicaid Learning Center (MLC). Services included the design of employee onboarding training programs and oversight of learning management system customizations and operations.

*Programmatic Managed Care Support (05/2024 to present)*  
As a business analyst, Nolan works with the content development team to help design, develop, and deliver training courses and programs through BerryDunn's MLC. Services included the design of managed care training programs and oversight of learning management system customizations and operations.



*Partnership Management Support and Provider Management Support Projects (09/2023 to present)*

Working on this project, Nolan provides project management and APD support for the partnership management work provided between West Virginia and partnering states and territories. In his role, Nolan drafts APD documents and budgets, supports the project management of APD development, helps identify and track project risks. Nolan continues to provide support specifically focused on APD financials.

*APD Assistance (08/2023 to present)*

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

*Organizational Development Project Phase I (07/2022 to 06/2023)*

As a business analyst, Nolan assisted the State with activities specific to organizational development in West Virginia. His focus included supporting the State as BMS developed and implemented a three-year strategic plan. Services included the design and facilitation of a multi-day strategic planning retreat, creating workshops, webinars, and e-learning courses that supported strategic plan implementation, deliverable development, and meeting facilitation.

*ARPA Section 9813: Mobile Crisis Grant Project (08/2022 to 02/2023)*

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

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

*Quality Management System (QMS) (06/2024 to present)*

As project manager, Nolan assists Iowa HHS with the implementation of their overall QMS solution, which includes strategic planning, requirement development, stakeholder engagement, solicitation development, APD and financial funding, evaluation support, vendor onboarding, and Centers for Medicare & Medicaid Services (CMS) certification support. In addition, Nolan manages a team of nine resources and oversees BerryDunn's implementation of an agile, interim QMS solution that leverages the State's existing infrastructure to deliver results while a long-term solution is designed, developed, and implemented.

*Medicaid Enterprise Modernization Effort (09/2023 to present)*

As an organizational change management (OCM) SME, Nolan assists IA HHS in establishing a portfolio management office and strategic planning for Medicaid Enterprise System Modernization efforts.

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

*Enterprise Objective Monitoring and Control (EOMC) Services (09/2023 to present)*

As an APD SME, Nolan is a part of the team supporting the PRMP EOMC Services project, which includes developing, updating, and tracking of PRMP APDs. In his role, Nolan provides input and design in the drafting of APD documents, MDBT files, and project templates. In addition, he helps identify and track project risks, issues, decisions, and action items for state leadership. Nolan continues to provide support specifically focused on APD financials.

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

*Enterprise Portfolio Management Office (EPfMO) Project (09/2023 to present)*



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

– **BerryDunn MLC (08/2022 to present)**

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

– **Delaware Department of Health and Social Services (DHSS), Division of Medicaid and Medical Assistance (DMMA)**

*APD Consulting Services Phases II and III (07/2022 to present)*

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

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

*Organizational and Business Process Redesign (11/2022 to 05/2024)*

As a learning platform administrator, Nolan worked with the job skills development team to help design, develop, and deliver over 30 thorough training courses and programs through BerryDunn's MLC. While supporting this project, he has established over 250 state employees on the platform who completed more than 4,000 courses and 6,000 hours of training.

– **CareOregon**

*Health Promotion Chronic Disease Prevention (HPCDP) Section Culture Change Management with Trauma-Informed Approach Project (11/2022 to 03/2024)*

As a change management SME and business analyst, Nolan supported the HPCDP Section in building and maintaining an inclusive environment by engraining culture changes into defined strategic priorities and goals. His role included the development and facilitation of agile and inclusive workshops, data collection and analysis, deliverable development, and meeting facilitation.

– **MaineHealth (05/2019 to 06/2022)**

Nolan worked as an intern with the senior HR team to develop pieces of training targeted at improving leadership competencies in directors and executives across the MaineHealth network. He developed pieces of training on time mastery, emotional intelligence, and DiSC, as well as assisted in the creation of MaineHealth's new leader first year success and Leader as Coach training programs, which were administered to all directors and executives. He organized and summarized annual systemwide employee engagement survey data and build a dashboard to measure and chart changes across HR metrics.

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

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





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

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

**PUBLICATIONS**

- Co-Presenter – *Even Covid Couldn't Stop Us: How Hawai'i Switched Gears and Created Virtual Self-Paced Job Skills Development Courses During a Global Pandemic*, Presentation for Medicaid Enterprise Systems Conference 2023, 8/24/2023.
- Co-Presenter – *Equity Focused Strategic Planning: How Two States Balanced Priorities*, Presentation for Medicaid Enterprise Systems Conference 2024, 8/14/2024.



## Sarah Renner, MPH, MBA

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

### EDUCATION AND CERTIFICATIONS

MBA, University of Indianapolis

MPH, Indiana University

BA, Hanover College

### PROPOSED PROJECT ROLE

General Project Manager

### MEDICAID EXPERIENCE

9.5 years

Sarah Renner is a senior consultant in the Medicaid Practice Group with more than 20 years of state government management and consensus building experience. She has a talent for rapidly learning and mapping new and complicated information and has a drive for results. Sarah has a natural ability to listen, communicate, and collaborate. She leads and participates in improving health equity and oversees sensitive and confidential information with respect and perceptiveness.

### KEY QUALIFICATIONS

- More than 20 years of state government management
- More than seven years of experience with Home and Community-Based Services (HCBS) waivers
- Skilled in organizational leadership, financial planning, data analysis, consensus building, decision-making, and policy development

### PROJECT EXPERIENCE

#### BerryDunn (08/2022 to present)

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

##### *Take Me Home (TMH) HCBS Quality Initiative (10/2024 to present)*

As program manager, Sarah provides project leadership and subject matter expert (SME) support for the implementation of Long-Term Services and Supports (LTSS) quality measures implementation and HCBS Quality Management Plan. Sarah also leads planning discussions and monitors controls execution of the implementation schedule.

##### *1915(c) Children with Serious Emotional Disturbance (CSED) Waiver Development Project (08/2022 to present)*

Sarah provides program management oversight focusing on HCBS waiver cohesion, HCBS quality measurement, and managed care HCBS requirements.

##### *American Rescue Plan Act (ARPA) Section 9817: HCBS Implementation Project (08/2022 to present)*

Serving as project manager, Sarah oversees this project and provides subject matter expertise for the updating of the ARP HCBS Spending Plan. Sarah also leads planning discussions and monitors controls execution of the implementation schedule.



As program manager, Sarah provides project leadership and SME support to the Aged and Disabled Waiver (ADW), Traumatic Brain Injury Waiver (TBIW), and Intellectual and Development Disabilities Waiver (IDDW) renewal and amendment applications, waiver redesign, provider manual updating, HCBS Quality Management System, and Centers for Medicare & Medicaid Services (CMS) Ensuring Access to Medicaid Services Final Rule compliance.

***1115 Demonstration Behavioral Health Project (08/2022 to 06/2024)***

As a policy analyst and SME Sarah worked to update the substance use disorder (SUD) implementation plan, researched, and developed new service definitions and supported the development of the Serious Mental Illness (SMI) implementation plan for Phase 1.

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

***Research Studies to Cover Contingency Management (CM) Services (05/2024 to present)***

Sarah is the project manager overseeing the deliverables, interested parties feedback, and contributing as a SME for the CM research studies. The research studies inform DHS how CM services may be incorporated into the 1115 SUD waiver and Indian Health Services system.

***Program Analysis of Implementation of a Program of All Inclusive Care for the Elderly (PACE) Program (09/2023 to 07/2024)***

Sarah was a SME for a project that helped DHS analyze options for the implementation of PACE. Sarah designed an analysis of existing programs, contributed to interested parties feedback sessions, and assisted with the development of policy and administrative requirements.

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

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

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

Sarah served as a Senior Manager in Consulting to lead internal team working on the Idaho Department of Health and Welfare (DOHW) Patient Centered Medical Home Incentive Payment Accounting System (PCMH I-PAS), which required information system, dashboard, progress measure, incentive payment, and recoupment design development. She managed project budget, invoicing, and financial reconciliation, and also led the New Jersey Department of Health (DOH)



implementation of the Delivery System Reform Incentive Payment (DSRIP) program, a demonstration program designed to result in better care for individuals and populations and lower costs by transitioning payment to incentive outcome attainment. She also managed staff, budget, and contract deliverables, and oversaw Databook updating, payment generation, performance measure results reporting, learning collaborative presentations, progress report reviews, and client relationships. She participated in the New Hampshire DOHW implementation of the DSRIP Independent Assessor and Learning Collaborative projects which included designing technical assistance and training tools for Independent Delivery Networks (IDNs), developing project plan evaluation tools, evaluating project plans, and providing training and technical assistance to IDNs during the project plan development phase.

**Indiana Department of Health (IDOH) (07/2005 to 10/2015)**

**– Director, Women, Infants and Children (WIC) (02/2010 to 10/2015)**

Sarah optimized \$150 million in supplemental food and nutrition services serving 280,000 women, infants, and children through 140 clinics and 700 grocery stores and pharmacies. She implemented policy changes balanced by cost containment and nutritional need for WIC's food package revisions for prenatal, postpartum, and breastfeeding women, infants, and children. She provided leadership to WIC's transition to a new information system that provides Electronic Benefits Transfer (EBT) instead of checks; enhanced WIC clinic staff performance optimization by developing outreach and business development training targeting relationship building with medical offices and hospitals; and developed WIC's first quarterly benchmarking system for local agencies administering WIC services. She consensus-built with clinic staff to implement the Loving Support Model to increase lactation rates and improve health status of WIC participants, and managed The Emergency Food Program (TEFAP), provided strategic and financial planning for Indiana's infant mortality media campaign, and led stakeholders through budget reductions due to sequestration and federal government shutdown.

**– Director, HIV/STD/Adult Hepatitis (09/2008 to 02/2010)**

Sarah managed \$26 million state and federal dollars to build linkages between HIV/AIDS prevention, services and surveillance with STD, Hepatitis, Tuberculosis (TB), Immunization and Substance Use strategies. She collaborated with Indiana State Department of Health (ISDH) Laboratory to help ensure infection disease test results were transmitted to local health departments, community-based organizations, and Department of Corrections.

**– Deputy Assistant Commissioner (07/2005 to 09/2008)**

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



## Shardae Bunche, MPH

MANAGER

Berry, Dunn, McNeil & Parker, LLC

### EDUCATION AND CERTIFICATIONS

Doctorate in Public Health Leadership (9 credit hours complete), Georgia Southern University  
MPH, Florida A&M University

### PROPOSED PROJECT ROLE

General Project Manager

### MEDICAID EXPERIENCE

13 years

Shardae is a Medicaid and healthcare professional with more than 10 years of experience in health policy, healthcare management, public health, and health systems management. She has experience in administrative tasks, policy consulting, and working with state health agencies. Other experience includes facilitating meetings with executive leadership to build process mapping, maintaining documentation of meeting minutes and action steps, and assisting with documenting business requirements.

### KEY QUALIFICATIONS

- Five years' experience managing the Medicaid Program with the Georgia Department of Behavioral Health
- 10 years' experience in Medicaid Program policy
- Completed "Program Management Foundations" course and have five years of program management experience
- Client relations
- Leading projects
- Project/program management
- Policy analysis

### RELEVANT EXPERIENCE

#### **BerryDunn (12/2021 to Present)**

Shardae is a manager with BerryDunn's Medicaid practice group.

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

*Policy Management Support (07/2023 to present)*

Shardae supports PR's single State Medicaid agency as Program Manager for Policy Management Support.

*Enterprise Objective Monitoring and Control (EOMC) Services (12/2021 to 07/2023)*

Shardae served as the State Plan Amendment (SPA)/Policy service lead.

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

*EPMfO Project (10/2024 to present)*

Shardae supports the EPMfO Project as the SPA lead.

#### **Incept Data Solutions, Inc. (12/2019 to 12/2021)**

As a policy consultant, Shardae was responsible for the review of all Medicaid and Children's Health Insurance Program (CHIP)-related policies, including state and federal policies, rules, regulations, and



sub-regulatory guidance; advising PERM data processing and review staff on interpretation of policy; and discussing the effect of policy on review. She helped to ensure all policy related requirements and deliverables listed in the PERM SOW are completed thoroughly and timely, including compilation and completion of each state's Master Policy List, upload and processing of all state policies, and compilation and completion of the Federal Regulation tracker. She also worked with data processing and medical review SMEs to discuss policy interpretation, as well as applications development staff to ensure all policies are uploaded properly as required in the SOW.

**Georgia Department of Behavioral Health and Developmental Disabilities (2014 to 10/2019)**

As a Medicaid and Health Systems Manager, Sharda coordinated with the Division of Mental Health and Addictive Diseases and Administrative Services to design and develop new Medicaid programs, Medicaid program amendment(s), and to support the Department of Community Health in behavioral health-related programs. She served as a key Medicaid subject matter expert (SME) in new systems implementation, helping ensure accuracy with business requirements and functional specifications, as well as an analyst for major IT initiatives including MMIS change service requests (CSRs) between DBHDD and Medicaid Agency.

**Florida Agency for Health Care Administration – Medicaid Services (2012 to 2014)**

As a medical/health care program analyst, Sharda managed two managed care organization contracts within the Bureau of Medicaid Services, as well as Medicaid reimbursement program operations and coordinated program policy development and implementation. She represented the Agency as a program subject matter expert at public presentations; provided assistance to Medicaid recipients, providers, and stakeholders with policy related issues; analyzed and developed fiscal impact statements on proposed cost containment measures and program revisions; and conducted policy reviews, as well as systems analysis and development.

Sharda also significantly contributed to the Implementation of the 1115 Demonstration Waiver for Statewide Medicaid Managed Care (SMMC) by providing extensive research methods and policy development.

**Florida Department of Health – Central Pharmacy (2012)**

As an accountant in the procurement office, Sharda provided financial administrative assistance, including maintain purchase logs, managing reimbursements, reconciling invoices, and maintaining fiscal reports.



# Emily Richards, MA, Prosci® CCP

MANAGER  
Berry, Dunn, McNeil & Parker, LLC



**EDUCATION AND  
CERTIFICATIONS**

MA, International  
Commerce and Policy,  
George Mason University  
BA, Political Science,  
West Virginia University  
Prosci® Certified Change  
Practitioner

**PROPOSED PROJECT  
ROLE**

General Project Manager

**MEDICAID EXPERIENCE**

13 years

Emily Richards is a manager in BerryDunn’s State Government Practice Group and brings extensive experience working in state government health and human services (HHS) operations. Emily is an innovative leader and change agent, with demonstrated success leveraging public, private sector, and non-profit experience to strengthen organizations by marrying systems thinking with organizational change, project management, and health information technology expertise.

**KEY QUALIFICATIONS**

- Over 10 years of project, program, and change management experience
- Former director of the state of Vermont’s Health Information Exchange (HIE) Program
- Successful experience leading and implementing complex multi-year technology projects
- Deep HHS and organizational change management experience
- Strong experience working with, and deep understanding of, health information systems and operational management
- Established the Change Management practice at Vermont’s Agency of Human Services
- Prosci® Certified Change Practitioner

**PROJECT EXPERIENCE**

**BerryDunn (07/2022 to present)**

- United States Virgin Islands (USVI) Department of Human Services

*Enterprise Portfolio Management Office Project (10/2024 to present)*

Emily supports the Enterprise Portfolio Management Office Project which provides project planning and engagement oversight, organizational development support services, Medicaid program and certification support, outcomes-based Medicaid Information Technology Architecture (MITA) State Self-Assessment (SS-A)



support, and business process redesign and policy support. Emily supports the enterprise with information technology advisory services as a subject matter expert.

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

*HIT/HIE Support Services (12/2021 to present)*

Emily is serving as the program manager to support PRDoH and Puerto Rico's Medicaid Program (PRMP) with planning and implementation of a health data utility (HDU) HIE. Services provided by the BerryDunn team include the development of a strategic plan and support for establishment and operations of an HIE governance council. BerryDunn supported PRMP in revising their operational strategy and developing an RFP to procure a new HIE vendor to provide expanded services. In addition, BerryDunn provides project management services for HIE planning and implementation activities and other support such as financial planning and developing Advanced Planning Documents (APDs) to request funding from Centers for Medicare & Medicaid Services (CMS) and supporting public health interoperability.

**Vermont Agency of Human Services (2012 to 2022)**

– **Director, HIE Program (2016 to 2022)**

As director of Vermont's HIE program, for the Vermont Agency of Human Services, Vermont's Single State Medicaid Agency, Emily transformed an underperforming department and instilled trust through diligent, accountable action. In this capacity, Emily prompted essential legislative action that updated consent to share health records policy and removed barriers to achieve data exchange goals statewide. She led a large, multiyear project to develop the State's centralized healthcare data management architecture to embolden healthcare decision-making, optimize healthcare operations, and advance value-based care. Additionally, Emily established and led the cross-sector health IT governance structure, including the HIE steering committee that was legislatively mandated to develop an annual strategic plan guiding statewide health IT planning and investment. In this role, Emily negotiated, secured, and managed millions in federal and state investment to sustain health IT and support transformational change and healthcare advancement; led successful certification of Vermont's HIE, helping ensure sustained Medicaid funding; served as advisory council member of the National Association for Health IT State Leaders; and managed the Agency's HIE Unit, which included direct reports and matrixed staff.

– **Director, Organizational Change Management, Medicaid Enterprise (2014 to 2016)**

In this role, Emily constructed business plans and built the program from inception to support execution of healthcare IT initiatives for various statewide Medicaid and HHS programs. She designed and delivered individual assessments and consultations, customized training plans and sessions, designed intensive workshops based on organizational structure, best practices, employee needs, compliance, and quality management. Additionally, Emily served as advisor to project teams and liaised with all organizational levels to support user engagement and adoption of business practices in the modernization of healthcare. She also developed and orchestrated events for 200+ staff to help enhance engagement and buy-in of the organizational shift.

– **Education and Outreach Director, Vermont Health Connect (2012 to 2014)**

In this role, Emily oversaw project planning and execution of a multi-faceted, multiyear state health insurance enrollment campaign that resulted in a reduction of Vermont's uninsured population. She led a team of four reports in the training and support of hundreds of grantees conducting outreach and enrollment.





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**ICF International**

As program analyst, Emily collaborated with the CDC, FEMA, and other federal entities to conduct qualitative research and provide tools for public health campaigns, with a focus on marketing, community engagement, technology integration, and communications.

**Volunteer Fairfax**

As emergency response program manager, Emily developed and facilitated emergency preparedness trainings and implemented a volunteer mobilization initiative.



**Yoko McCarthy, MBA, CFE,  
CGFM, CISA, CIA**

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



**EDUCATION AND  
CERTIFICATIONS**

MBA, Finance, Information  
Systems, and Supply Chain  
Services Management,  
University of Massachusetts  
BA, Economics, Kobe College,  
Hyogo, Japan  
Certified Fraud Examiner (CFE)  
Certified Government  
Financial Manager (CGFM)  
Certified Information Systems  
Auditor (CISA)  
Certified Internal Auditor (CIA)

**PROPOSED PROJECT ROLE**  
General Project Manager

**MEDICAID EXPERIENCE**  
4.5 years

**AFFILIATIONS AND  
MEMBERSHIPS**

- AGA Boston Chapter,  
FY2025 president,  
executive committee  
member
- Association of Certified  
Fraud Examiners, Institute  
of Internal Auditors, AGA,  
and ISACA member

Yoko is a principal in BerryDunn’s Government Assurance Practice Group (GAPG). She co-leads the Compliance and Risk Management practice, which focuses on compliance assurance services. Yoko has helped various states and municipalities to strengthen their internal controls to protect their resources from waste, abuse, and fraud. This assistance aims to improve operational efficiency while maintaining compliance. Prior to joining BerryDunn in 2012, Yoko worked for the Massachusetts State Auditor’s Office for over eight years.

**KEY QUALIFICATIONS**

- More than 20 years of auditing experience
- 10+ years supporting Medicaid programs and initiatives,  
including directly supporting single state Medicaid agencies

**PROJECT EXPERIENCE**

**BerryDunn (10/2012 to Present)**

- Detroit Wayne Integrated Health Network (DWIHN)  
*Medicaid Claims Audits (10/2024 to Present)*

Yoko is an engagement principal overseeing the team that provides auditing and program integrity services to DWIHN. The BerryDunn team provides expertise to audit claims where fraud, waste, abuse, or other noncompliance is alleged by either internal personnel or the State of Michigan. The audit team assesses elements including eligibility, individual care plans, and claims submission and payment, which are used to provide DWIHN with a report on the findings and recommendations at the conclusion of each audit.

- West Virginia Bureau for Medical Services (BMS)  
*IT Control Environment Review (07/2024 to Present)*

Yoko serves as a general project manager and oversees the team that reviews the IT control environment of the Medicaid Management Information System (MMIS) program. BerryDunn conducts interviews of key personnel and reviews the policy and procedure documents related to the governance of the MMIS



program, with a focus on the review of the System and Organization Controls (SOC) report, access controls, and configuration management controls. This review is expected to result in assisting BMS to develop policies and procedures to address identified control gaps.

*Independent Review of Controls for Service Organizations Report (02/2024 to 04/2024)*

Yoko served as a subject matter expert (SME) on the project reviewing the findings from EY's Single Audit related to the review of the SOC.

– **Kennebec County, ME**

*Payroll Review (01/2024 to Present)*

Yoko serves as the engagement principal on the team that provides an assessment focused on payroll system controls at the department and county levels. These controls are evaluated against relevant union contracts and county policies. Specifically, BerryDunn reviews existing union contracts, and associated rules, within the County's payroll system. The team analyzes pay accuracy through using an agreed-upon sampling methodology. BerryDunn conducts follow-up testing as necessary based on risk areas identified during initial assessments.

– **Washington Health Benefit Exchange**

*State Premium Assistance Performance Audit (01/2024 to Present)*

Yoko serves as a co-principal, overseeing BerryDunn's team that conducted a performance audit of the Washington Health Benefit Exchange's management of the State Premium Assistance Program: a state-funded and managed health insurance premium assistance program. BerryDunn conducts the audit in accordance with Government Auditing Standards, including sample-based testing, to assess the management of the program.

– **City of Reno, NV**

*Employee Benefits Review (10/2023 to Present)*

Yoko oversees BerryDunn's team performing an independent performance audit of the City's payroll processes to help ensure compliance with laws and regulations as well as to report on the adequacy of the Payroll Division's processes. This engagement's objective is to help ensure the accuracy, completeness, reliability, and timeliness of payroll information. The team reviews the City's use of overtime and special pay codes in addition to adherence to employee policies, established standards, procedures, and relevant regulations.

*Payroll Audit (10/2022 to 08/2023)*

Yoko served as the engagement principal overseeing BerryDunn's team that assisted the City with sample testing to determine whether employee benefits were administered accurately and timely in accordance with applicable laws, regulations, and policies and procedures. The team also helped assess the efficiency and effectiveness of the benefits management process—including internal controls for approvals, permissions, and segregation of duties—and recommend improvements.

– **State-Based Health Insurance Exchanges (HIXs)**

*Programmatic and Financial Audits (2015 to Present)*

Yoko oversees the team that provides the annual programmatic audits for 10 State-Based HIXs: California, Kentucky, Maine, Massachusetts, Minnesota, Nevada, Pennsylvania, Rhode Island, Vermont, and Washington. The programmatic audits assess compliance with federal requirements of the Affordable Care Act contained in 45 CFR 155. These audits are conducted in accordance



with American Institute of Certified Public Accountants (AIPCA) Standards, and Government Auditing Standards.

– **Colorado Office of the State Auditor**

*Medicaid Recovery Audit Contractor Program Evaluation (08/2023 to 06/2024)*

Yoko served as the engagement principal overseeing the BerryDunn team evaluating the Colorado Medicaid Recovery Audit Contractor Program. BerryDunn assessed the program's compliance, financial impact on the state, impact on providers, and overall effectiveness. BerryDunn's engagement provided insights, data, and recommendations to the Colorado Legislature and the Medicaid agency that can be used to inform decisions regarding the program's structure.

*Marijuana Inventory Tracking Data Evaluation (03/2019 to 09/2019)*

Yoko served as a lead auditor on an evaluation of the Colorado Department of Revenue's (DOR) administration of the marijuana industry to identify opportunities for the DOR to better leverage and use marijuana inventory tracking data. These insights helped to inform, direct, and target the DOR Marijuana Enforcement Division's (MED) inspection and enforcement activities and the DOR Tax Division's audit activities. Yoko helped assess the degree to which the DOR had proper controls in place to minimize the risk of tax evasion and the risk of diversion of marijuana products to illegal markets.

– **Minnesota Office of the State Auditor (OSA)**

*Audit Practices and Procedures Evaluation (02/2024 to 10/2024)*

Yoko served as the engagement principal overseeing the BerryDunn team performing an evaluation of the Minnesota OSA's Audit Practice Division. The evaluation aimed to identify opportunities for improvement that would enhance the OSA's audit efficiency while maintaining compliance with auditing standards. The evaluation covered operational areas such as scheduling, project budgeting, and time tracking, the use of audit tools and software, preparation of audit workpapers, and staffing functions. Our report included the results of the areas evaluated and recommendations to improve the division's operations.

– **Covered California**

*Senate Bill 260 Performance Audit (11/2023 to 08/2024)*

Yoko served as the engagement principal overseeing the BerryDunn's team that conducted a performance audit of Covered California's administration of the requirements in 2019 California Senate Bill 260. The Senate Bill requires Covered California to automatically enroll Medicaid enrollees who lose coverage into Covered California Qualified Health Plans. BerryDunn conducted the performance audit in accordance with Government Auditing Standards. BerryDunn tested samples of eligibility determinations, verification procedures of applicant information, and reviewed documents and data to assess the Exchange's performance administering the provisions of SB260.

– **Washington, DC Public Schools**

*Contract and Procurement Review (07/2023 to 01/2024)*

Yoko served as the engagement principal overseeing the BerryDunn's team that was engaged to review the DC Public Schools' contract and procurement activities. BerryDunn assessed executed contracts for compliance with DC purchasing requirements, reviewed contract award procedures, and assessed internal controls. BerryDunn also reported on identified risks and developed recommendations for the contracting and procurement processes.

– **Arizona Health Care Cost Containment System**



*Forensic Auditing and Accounting (05/2023 to 12/2023)*

Yoko led the BerryDunn team providing forensic Medicaid review services to Arizona's state Medicaid agency. The team reviewed and assessed records, files, claims, and other data to support the agency's program integrity activities.

– **Metropolitan Government of Nashville and Davidson County (Metro), TN Office of Internal Audit (OIA)**

*Performance Audit of Community Foundation of Middle Tennessee (12/2022 to 12/2023)*

Yoko led the BerryDunn's team conducting performance audit of a non-profit organization, Community Foundation, on behalf of the Metro OIA.

*Investigation of Nashville General Hospital (11/2020 to 12/2021)*

Yoko led BerryDunn's team conducting an investigation of certain matters related to allegations involving Nashville General Hospital.

*Agreed-Upon Procedures (05/2019 to 02/2020)*

Yoko led BerryDunn's team conducting agreed-upon procedures on risk areas concerning procurement and compliance with policy related to contracts with selected Metro vendors. The team conducted a review of vendor selection processes, vendor contract requirements, billing, invoices, and Metro's vendor management procedures through document reviews, testing, and on-site interviews.

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

*Medicaid/Children's Healthcare Insurance Program (CHIP) Eligibility Determination Review (11/2021 to 09/2023)*

Yoko led the BerryDunn team reviewing accuracy of PRMP's eligibility determinations and recertifications. This review also included as capitation payments on a sample of Medicaid and CHIP beneficiaries.

– **Massachusetts Essex County District Attorney's Office**

*Compliance Assessment (10/2022 to 12/2022)*

Yoko led the BerryDunn team that conducted an independent assessment of internal controls, policies and procedures, financial activities and accounts for the Essex County District Attorney's office.

– **Town of Blackstone, MA**

*Operational Assessment (10/2021 to 07/2022)*

Yoko led the BerryDunn team that reviewed the Town's key processes for risks and efficiencies. These processes including accounts payable, accounts receivable, cash management, payroll, purchasing, tax titles, and tax assessments. The team assessed the efficiencies of the Town's existing processes, identified opportunities for improvement, and made recommendations.

– **Maricopa County, AZ Internal Auditor's Department**

*Review of the Maricopa County Adult Probation Department (05/2022)*

BerryDunn's team performed a review of the Department's compliance with the Arizona Code of Judicial Administration's requirements and department policies. This extended to review of the department's conformance with best practices in the area of victim services.

*Internal Audit of County Sheriff's Office Bonds, Fine, and Court Order Processing (02/2019 to 05/2019)*



BerryDunn's team assisted the Maricopa County Internal Auditor's Department with the risk assessment and other planning activities. Yoko's team conducted audit fieldwork testing and assessed whether the SIMS Division shift schedule provided adequate supervisory oversight and training resources. These tests also assessed if the SIMS Division shift consistently adhered to policies, procedures, and other applicable rules and regulations.

*Independent Assessment of the IAD Recorder's Office Election Process (09/2018 to 11/2018)*

BerryDunn's team provided an independent assessment of the County Records Office's processes for planning and executing Election Day activities for the 2018 primary election.

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

*Financial Monitoring and Compliance Review Services for Residential Treatment Level IV and Above IV Providers (06/2021 to 02/2022)*

Yoko led a project to review case files for over 40 different residential treatment facilities serving the DSS' child welfare program. Yoko reviewed these records, assessing whether the facilities complied with state requirements and properly billed the DSS for the services they provided to children under their care.

*Independent Security Assessment (ISA) for Missouri Eligibility Determination and Enrollment System (MEDES) (06/2014 to 11/2014)*

Yoko served as a project manager for BerryDunn's engagement to conduct an ISA of the MEDES, which is required for Missouri's continued Authority to Connect status with the Federal Data Services Hub. This assessment required identification and assessment of security risks related to the development and operation of the MEDES functions and to the confidentiality, privacy, integrity, and availability of critical, personally identifiable data. For this assessment, Yoko followed the best practices and the requirements of the Centers for Medicare & Medicaid Services' (CMS') catalog of Minimum Acceptable Risk Controls for Exchanges and other state and federal privacy and security laws. This project also included the development of an action plan to mitigate the risks identified during the assessment.

**– North Carolina Pandemic Recovery Office (NCPRO)**

*ARPA Grant Management (11/2021)*

Yoko was a SME helping NCPRO establish a compliance process for over \$5.4 billion in ARPA grants. She participated in meetings with the internal auditors and state auditors to aid in their understanding of the existing audit and compliance environment and what steps could help ensure compliance with ARPA requirements.

**– Missouri Division of Accounting**

*Overtime Pay Review (10/2021 to 12/2021)*

Yoko led BerryDunn's team as an engagement manager to verify whether comp time was calculated and paid in accordance with the Fair Labor Standards Act (FLSA) related to pandemic hazard pay.

**– Maine Department of Administrative and Financial Services**

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

Yoko served as a financial analysis SME on the assessment of future viability of a state agency.

**– New Hampshire Liquor Commission**

*Audit Readiness and Business Process Improvement (06/2017 to 12/2020)*

Yoko led BerryDunn's team to provide process improvement and audit readiness services. The



team reviewed the existing processes and procedures in place to prepare for, and respond to, the Annual Comprehensive Annual Financial Report audit prepared using Governmental Accounting Standards Board standards.

**– Minnesota Management Analysis and Development (MAD)**

*Review of Accounting and Financial Management Processes (04/2020 to 09/2020)*

Yoko led BerryDunn's team to conduct the engagement's review of accounting and financial management processes. Her team examined the existing financial processes of MAD and performed a gap analysis. Using these insights, the team made detailed recommendations to improve MAD's efficiency of financial management and the timeliness, accuracy, and transparency of the client's financial reporting.

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

*Medicaid and CHIP Eligibility Determinations and Best Practices (06/2019 to 03/2020)*

Yoko led BerryDunn's team that conducted redeterminations of eligibility for Medicaid and CHIP members. The team's efforts helped to identify if Alaska was appropriately granting eligibility according to federal and state regulations and statutes.

*Exam of Alaska's Integrated Resource Information System (IRIS) General and Application Controls (01/2016 to 2017)*

Yoko assisted the DLA in the identification and examination of IT general controls and application controls related to IRIS with a goal of compliance and attestation of the general and application controls of IRIS. DLA used the results of the review to plan its audit of the State's financial statements and single audit for fiscal years 2016 to 2017.

**– Lake County, IL**

*Audit of Contract Deliverables for e-filing Implementation (05/2019 to 11/2019)*

Yoko served as the lead analyst and conducted an evaluation of Lake County's electronic court filing (e-filing) system implementation. Through this forensic audit, BerryDunn helped Lake County's leadership determine what work was performed by the system integrator, which funds were used to pay for implementation activities, and whether the vendor met its contractual obligations.

**– Massachusetts HIX/IES Entities**

*IV&V Services (11/2012 to 02/2018)*

BerryDunn provided IV&V for Massachusetts' HIX/IES implementation. Beginning in 2014, Yoko led the Financial Review task area for IV&V services, providing monthly financial status reporting, documenting cost allocation methodologies, reviewing the system integrator's invoices, and assisting with change request review. Her major responsibilities included review of the financial management process and tools for this project to help ensure integrity of the financial data, review of various funding sources based on the approved cost allocation methodology, and help ensuring efficiency of the financial management process' efficiency. In addition, her team assisted with the development of IAPD-US, which resulted in the Commonwealth receiving over \$110 million in federal funds under Title XIX.

**– Children and Family Services of New Hampshire**

*Forensic Accounting Services (10/2016 to 12/2016)*

Yoko led BerryDunn's team providing forensic accounting services to Children and Family Services of New Hampshire, a non-profit organization. The project included drafting initial findings, as well



as preparing a final audit report.

**– Missouri Department of Social Services, MO HealthNet Division (MHD)**

*MMIS ISA (10/2013 to 05/2014)*

Supporting Missouri's single state Medicaid agency, Yoko served as project manager for a security risk assessment of Missouri's MMIS, based on nationally recognized standards and regulatory requirements, including NIST SP 800 series, ISO 27000 series, and HIPAA, among others. As part of the assessment, BerryDunn's team developed an action plan to help MHD, ITSD, and the vendor to address known risks; identified opportunities to strengthen the application development methodology for ongoing maintenance and development of the MMIS; and established a framework for the State to conduct routine security assessments of data and information systems going forward.

**Massachusetts Office of the State Auditor (OSA) (04/2004 to 09/2012)**

Yoko was employed with the Massachusetts OSA for eight years, with responsibility for the following activities:

**– Data Mining and Analysis for the Medicaid Audit Unit**

Yoko analyzed Medicaid data, EBT card transactions data, and lottery winner data for welfare fraud analysis for the Bureau of Special Investigations; prepared quarterly reports for the legislature; served as a member of the OSA data mining committee; and analyzed the results of various surveys.

**PRESENTATIONS AND PUBLICATIONS**

- December 2011. "Elevating Your Career Through Mentorship" Panel discussion at AGA Council for Advancement of Women seminar
- November 2023. "Better Together – Compliance, Internal Audit, and the Case for Independently Collaborative Work Plan Development" presented at Annual Compliance and Audit Conference of New England Healthcare Internal Auditors/Healthcare Financial Management Association.
- January 2025. "Being A Chapter President" Podcast on Accountability Talks from AGA





# Renee Gayhart, MA

SENIOR MANAGER  
Berry, Dunn, McNeil & Parker, LLC



**EDUCATION AND  
CERTIFICATIONS**

MA, International  
Relations and Financial  
Management, School for  
International Training  
  
Double BA, Science,  
International Business,  
Marketing and Political  
Science, Fort Lewis  
College

**PROPOSED PROJECT  
ROLE**

General Project Manager

**MEDICAID EXPERIENCE**

5 years

Renee Gayhart is a senior manager at BerryDunn with a diverse background in the healthcare industry and experience, which includes the development, implementation, operationalization, and quality assurance of multimillion-dollar contracts. Renee is a proven leader with a track record of completing projects on time and on budget. She has managed capital, Tribal infrastructure, and reclaiming projects and initiatives, as well as improvements in healthcare delivery, as a compassionate and respectful leader capable of building and supporting successful relationships both inter- and intra-departmentally.

**PROJECT EXPERIENCE**

**BerryDunn (01/2025 to present)**

Renee is a senior manager in BerryDunn’s Medicaid Practice Group (MPG).

**Alaska Department of Health and Social Services**

**– Director, Health Care Services (05/2019 to 08/2024)**

Renee served as Director of Healthcare Services for Alaska’s single state Medicaid agency, the Department of Health and Social Services, where she oversaw Operations, Quality Assurance, Systems, Accounting, Reclamations and Recoveries, Pharmacy, Medicaid Medical Director, Tribal Programs, Residential Licensing, Health Facilities Certification and Licensing, Background Check unit, and Administration Operations. She oversaw the \$45-50M weekly check write to 30,000 Medicaid providers to help ensure balance with the fiscal agent and the Treasury. She also oversaw the licensing section of 135 health facilities and over 800 residential settings, as well as 30,000 background checks annually. In addition, Renee oversaw the collection of over \$680M in Medicaid recoveries, rebates, and general fund reclaiming. She analyzed, tracked, and projected healthcare delivery and Medicaid expenditures up to \$2B flowing through the Medicaid Management Information System (MMIS). Renee testified at the House and Senate legislatures on dozens of health care bills each year and worked with stakeholder groups and provider associations to gather input for cost containment and budget cuts. She held an executive branch seat on the Medical Care Advisory Committee, participated in the Executive Leadership team at Department of Health and Social Services, and acted as Liaison to the



State Tribal Medicaid Task Force for Tribal consultation.

**– Commissioner’s Office of Medicaid and Healthcare Policy Tribal Health Program Manager (04/2004 to 05/2019)**

Renee implemented the State Health Official (SHO) February 26, 2016 guidance letter to develop a process to do Tribal refinancing, supporting the first state in the nation to successfully operationalize at high dollar value. Since implementation of the SHO in State Fiscal Year (SFY) 2017, she saved the Department \$105M in general funds, while being on task to save \$94M in SFY19 as requested by the Legislature. She also assisted with infrastructure development and capital projects to support new facilities; i.e., Kotzebue and Bethel 18-bed Long-Term Care facilities, ANMC 200-bed residential housing, and clinic remodel projects in various regions. Renee provided technical expertise to the Department’s eight Division Directors and their Health Administrators on Tribal Medicaid policy, Medicaid billing and navigation of the Alaska Tribal Healthcare System. In addition, she analyzed, tracked, and projected Tribal healthcare delivery and Medicaid billing volume of approximately one million claims at just over \$253M annually generated from 16(+) regional Tribal health organizations. Renee monitored Tribal claim activity and assisted with quality assurance in the form of extrapolated and/or void/adjust payback scenarios with Tribal facilities. She developed good working relations between the Department and the Alaska Tribal Health Consortium to promote development and implementation of new service categories to address healthcare disparities in the Alaska Native population, such as Tribal targeted case management and tobacco cessation. Renee provided on-site technical assistance to promote the settlement of total cost to programs delivering Early and Periodic Screening, Diagnostic, and Treatment (EPSDT) services to American Indian/Alaska Native (AI/AN) Medicaid children under age 21 through Continuing Care Provider Agreements at five Tribal facilities at approximately \$20M annually. She also oversaw the Department’s capital expenditure of approximately \$15M toward construction of eight facilities related to the “Bring the Kids Home” initiative in partnership with Denali Commission, MH Trust, and Rasmusson Foundation. At direction of the Deputy Commissioner, she acted as Tribal Medicaid Liaison for Medicaid Reform activities intended to develop/implement Medicaid sustainability, as well as revise state legislation, regulations and policy to realize approximately \$80M reduction of state general fund expenditures.

**– Developmental Disabilities (DD) Program Specialist III/Statewide Special Projects Coordinator (07/1999 to 04/2004)**

Renee was responsible for the statewide fiscal and program management of the Home and Community-Based Medicaid Waiver Program(s) at \$50M, the DD Community Grants at \$16M, OBRA Services at \$150K, and the refinancing of existing services to maximize utilization of Federal Match. She ensured waiver practices were in compliance with Centers for Medicare & Medicaid Services (CMS), formerly Health Care Finance Administration (HCFA), guidelines for waiver implementation. She also supervised DD Program Specialist I, Project Assistant, and Administrative Clerk III and acted as team leader for regional program specialists statewide. In addition, Renee provided technical assistance to 36 grantees and tracked all individualized service cost plans for 700(+) consumers receiving HCBW services. She provided programmatic and technical assistance to DD Service Coordinators. She also coordinated and participated in special projects associated with Medicaid regulations, certification packets, national employment



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leadership projects, family support projects, MMIS development projects, recruitment and retention projects and others as assigned. She acted as liaison with Departments within the State of Alaska; contractors outside of Alaska employment; nongovernmental entities; and national organizations such as National Association of State Developmental Disability Services (NASDDDS), President's Committee on Mental Retardation (PCMR), Association of the Mentally Retarded (AAMR), The Association of Severely Handicapped (TASH) and others as assigned.

Reach Inc. (09/1995 to 07/1999)

As a family services coordinator, Renee provided case management of 35 consumers residing in group homes, receiving in home supports, supported living, respite, supported employment, day habilitation, and intensive active treatment services. She supervised 15(+) employees providing services to caseload. She also secured funding for special projects such as internet classes for DD consumers, Special Olympics and recreational activities, leadership programs for young adults (age 16-22) in transition, and People First.

Alaska Department of Administration (04/1997 to 07/1998)

Renee served as a public guardian associate, where she provided guardian and conservator services to 110(+) court appointed Southeast Alaska consumers, including but not limited to financial planning, secured housing, committing consumers to institutions or nursing homes, accompanying consumers to court cases, transitioning consumers from jail or mental health units to their community of choice, etc. Her direct contact population included adults with chronic mental illness, dementia, Alzheimer's, substance abuse issues, developmental disabilities, and homelessness.



## Maggie Anderson, MS

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



Maggie Anderson has more than 30 years' experience working in state government with federally funded social services and child nutrition programs. She has demonstrated experience as the director of an umbrella agency as well as an agency division with the ability to oversee and administer department and division development and growth.

### EDUCATION AND CERTIFICATIONS

MS, Management,  
University of Mary

BS, Food and Nutrition,  
North Dakota State  
University

### PROPOSED PROJECT ROLE

General Project Manager

### MEDICAID EXPERIENCE

20 years

### KEY QUALIFICATIONS

- 14 years as Medicaid Director, with over 30 years in State Government
- 34 years of experience interpreting federal laws, regulations, and guidance to implement programs and lead operations, including 20 years specific to Medicaid
- Extensive Medicaid state plan and 1915(c) waiver experience
- Proficient at facilitating sessions with stakeholders, including Medicaid beneficiaries, providers, tribal government representatives, legislators, and advocacy organizations
- Experience working with leadership and staff from North Dakota Department of Corrections and Rehabilitation on Medicaid-related eligibility and coverage issues
- Skilled at preparing and presenting expert testimony and reports to state legislatures

### PROJECT EXPERIENCE

#### BerryDunn (11/2021 to present)

– **Minnesota Department of Human Services (DHS)**  
*1115 Waiver for Justice-Involved Individuals (02/2024 to present)*  
Maggie serves as a Medicaid subject matter expert (SME) for the Waiver for Justice-Involved Individuals project. Through this project, the team is supporting DHS to assist them in an effort to move forward with a Medicaid 1115 waiver for reentry services. The project will provide the State with the necessary information, data, and policy and cost analyses to begin developing Medicaid funding models that support corrections-involved Medicaid-eligible populations. The project will ultimately provide options and considerations for DHS for reentry services, as well as implementation, quality, and monitoring recommendations.



*Research Studies for Contingency Management Services (05/2024 to present)*

Maggie serves as a Medicaid SME for this project to assist the Minnesota DHS, Behavioral Health Division (BHD) to understand the feasibility, potential design, and federal authorities needed to cover Contingency Management services within the State's Medical Assistance program. As a result of the project, Minnesota will be positioned to move forward with informed policy proposals including a potential Medicaid 1115 waiver. The project will provide the State with the necessary information, data, policy, and cost analyses to inform the components of a potential 1115 waiver. The project will ultimately provide BHD options and considerations for CM services, as well as implementation, quality, and monitoring recommendations.

*Program Analysis of Implementation of a Program of All-Inclusive Care for the Elderly (PACE) Program (11/2024 to 06/2024)*

Maggie serves as a Medicaid SME for this project which provides support to DHS by providing a Program Analysis of Implementation of a PACE program. As part of her role, Maggie participated in on-site meetings with DHS and their stakeholders for the purpose of engaging with stakeholders on the potential implementation of PACE in Minnesota, and she helped prepare a report that provides a framework for Minnesota as they consider implementation of PACE.

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

*Substance Use Disorder (SUD) Waiver Initiative Project (11/2021 to present)*

Maggie provides subject matter expertise support. Her activities include the review of documents prior to their delivery to the client. In addition, she provides ad hoc support to client requests related to legislative activity or client requests for program changes or enhancements.

*State Plan Review and Support (SPRS) Project (11/2021 to present)*

Maggie provides subject matter expertise support. Her activities include the review of state plan amendment packages and policy documents, prior to their delivery to the client. In addition, she provides ad hoc support to client requests related to legislative activity or client requests for program changes or enhancements.

– **Puerto Rico Medicaid Program**

*Enterprise Objective Monitoring and Control (EOMC) Services (11/2021 to present)*

As part of the BerryDunn team in Puerto Rico, Maggie provides Medicaid policy analysis and state plan support. This work involves researching federal law and regulation as well as CMS documents, both present and historical, to assist Puerto Rico in supporting their Medicaid program goals. Maggie serves as a SME on the Puerto Rico team and has assisted the client with numerous state plan amendments, policy white papers, support during calls with CMS, and ad hoc requests.

Maggie was lead on writing a Money Follows the Person Demonstration Grant for Puerto Rico, which was awarded in 2022. She continues to serve as a SME to review project documents for the demonstration project.

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

Maggie worked as the Director of Medical Services Division responsible for the administration of the Medicaid Program, Medicaid Expansion, the Children's Health Insurance Program and Autism Spectrum Disorder services. She also served in the dual capacity as both Executive Director and Medicaid Director from August 2012 to December 2016. As the Executive Director, Maggie was responsible for all programs within the umbrella agency: Medicaid; the Children's Health Insurance Program; Economic Assistance Programs including Child Care Assistance, the Supplemental Nutrition Assistance Program, Temporary Assistance for Needy Families (TANF), and the Low Income Home Energy Assistance Program; Child Support; Aging Services; Children and Family Services; Vocational Rehabilitation; Developmental Disabilities Services; Behavioral Health



Services; and Field Services which includes the State Hospital, the Developmental Center, and eight regional human service centers.

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

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

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

**United States Department of Agriculture (08/1989 to 02/2003)**

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



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



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

**EDUCATION AND  
CERTIFICATIONS**

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

**PROPOSED PROJECT  
ROLE**

General Project Manager

**MEDICAID EXPERIENCE**

12 years

Shea Berry-Brennan is a principal in BerryDunn's Consulting Services Team, focused on providing project management support, research, and analysis services. Shea has over 10 years of project management experience, including experience working with state agencies on Independent Verification & Validation (IV&V), project management, strategic planning, organizational development, and procurement assistance projects. Shea has particular Medicaid experience developing her subject matter expertise in the following areas: organizational development and training, Centers for Medicare & Medicaid Services (CMS) certification, modular procurements, Medicaid Enterprise Systems modernization, provider management, care management, security management, and utilization management.

**KEY QUALIFICATIONS**

- Over six years of experience supporting the success of state health and human service (HHS) agency clients
- Extensive experience with modular procurements, implementations, and CMS certification—including Medicaid Management Information System (MMIS), integrated eligibility, provider management, care management, and utilization management systems
- Experience in the development of Medicaid enterprise approaches, strategies, and governance

**PROJECT EXPERIENCE**

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

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

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



BerryDunn was contracted as a follow-up to the Leadership Training with the OHHS leadership team to provide Operations and Strategic

- Planning support for the Coordination and Administration Oversight (CAO) team. This included interviews with key stakeholders, document review, and a full-day strategic operations planning session with leaders to support the vision of OHHS and their leadership to find actionable steps to improve project management and coordination across departments and branches.
- *Training and Leadership Development (12/2023 to present)*
- In collaboration with the NESCSO, the BerryDunn team developed a leadership development training program tailored to address the unique needs of Maine's Medicaid system focusing on the OMS. Additionally, the BerryDunn team worked with the state of Rhode Island's OHHS.
- The initial request was focused on matrix organization project management training to enhance cross-collaborative processes and align the states' Medicaid systems with evolving requirements.
- BerryDunn introduced and implemented the following methodologies and tools in the process:
  - Lean Six Sigma principles and methodology: Define, Measure, Analyze, Improve, Control (DMAIC)
  - The VOICE (Valuable Organizational Insights on Culture and Engagement): BerryDunn's proprietary assessment to drive continuous improvement and increase employee engagement.
  - Kaizen events: a structured approach to process improvement that encourages teams to work together to identify problems, develop solutions, and implement changes.
- The training resulted in actionable recommendations to improve OMS and OHHS's Medicaid systems' operations related to enhanced matrix functions, process improvement culture, formalized project procedures, and improved employee engagement efforts.
- **West Virginia Bureau for Medical Services (BMS)**
  - *Partnership Management (PM) Support Project (12/2023 to present)*
  - Shea provides executive oversight for the partnership management work provided between West Virginia and partnering states and territories.
  - *Provider Management Support Project (06/2018 to 06/2019)*
  - Shea served as the program manager for the provider management program for West Virginia, overseeing multiple projects that interact with the provider management Medicaid Information Technology Architecture (MITA) business area in the West Virginia Medicaid Enterprise. As the program manager, Shea lead multiple individual projects, each with its own project manager and dedicated team. Shea was responsible for managing all resources, budgets, deliverables, service level agreements, and risks and issues for all projects in the provider management program. Shea oversaw the following projects:
    - **Provider Enrollment (PEA) Year 2 Project**
    - **Access to Care Monitoring**
    - **Provider Incentive Payment (PIP) Audit Year 7 Project**
  - *Provider Enrollment Application (PEA) Project (08/2014 to 12/2016)*
  - Shea was the project manager on the provider enrollment project and responsible for maintaining and monitoring the project risks and issues log, project issue escalation process, and prove overall health status.





- *Project Management of MMIS Procurement, DDI, and Certification (08/2013 to 12/2015)*
- Shea served as the project management lead on the Bureau's MMIS implementation. She maintained the project risk and issue log and oversaw the process by which they were escalated to the client. She was also a liaison between the State and the vendor to address and remediate issues. This required that she facilitate executive level stakeholder meetings with the State, the MMIS vendor, and CMS. Shea also served as a design track lead for the utilization management, care management, provider management, and general/technical tracks. For each track, she was responsible for managing the repository of action items, organizing resources, and tracking decisions. She is also responsible for analyzing vendor deliverables aligned with her tracks to help ensure the correct project documentation has been provided and is available for future use.
- **Hawai'i Department of Human Services Med-QUEST Division (MQD)**
- *Organizational and Business Process Redesign (10/2019 to present)*
- Shea serves as BerryDunn's Program Executive Director supporting Hawai'i's single state Medicaid agency, the Department of Human Services. Shea is currently serving in the role for a business process redesign effort for the customer-facing sections of Hawai'i's MQD. Her work includes identifying opportunities for the State to leverage their new Medicaid eligibility determination system to improve efficiency and the customer experience. Before becoming the Program Executive Director, Shea also served as an IT project strategist, where she provided assessments and support in strategic planning of the current business models, providing recommendations for possible IT improvements.
- **Missouri Office of Administration Information Technology Services Division**
- *State Medicaid IT Assessment Project (07/2019 to present)*
- Shea serves as the consulting manager for the Missouri State Medicaid IT Assessment Project. For this project, Shea is leading the assessment of the State's current IT governance approaches and the development of short- and long-term recommendations. Ultimately, BerryDunn will develop a recommended future IT Governance Model. Shea is also responsible for managing all resources, the budget, all deliverables, service level agreements, and risks and issues.
- **Alaska Division of Health Care Services (HCS)**
- *MMIS Fiscal Agent Solicitation Consultant Services (09/2020 to 02/2021)*
- The BerryDunn team assisted HCS with visioning, researching, and developing a future MMIS solicitation, including vendor transition support. This included an extensive current state assessment, including staff assessments, web-based research, options analysis, competitive analysis, and cost research; and a final MMIS Modernization Recommendations Report was provided. Shea was the lead reviewer of this report, which ultimately provided multiple future strategic Medicaid Enterprise System (MES) modernization options.
- **Massachusetts HIX/IES Entities**
- *IV&V Services (10/2018 to 09/2019)*
- BerryDunn provided IV&V services for implementation of the Massachusetts Health Insurance Exchange and Integrated Eligibility System. Shea served as the temporary project manager for BerryDunn's IV&V engagement, overseeing project work and activities. Services included deliverable reviews; verification and validation of automated code review and continuous integration results; cost allocation and financial status reports; review of expected and delivered



reusability; independent assessment of implementation readiness; and issue and risk management.

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

- *MMIS and Fiscal Agent Services Assessment and Strategy Project (03/2018 to 09/2018)*
- Shea served as the lead senior consultant supporting New Hampshire's single state Medicaid agency, the Department of Health and Human Services. Shea supported the MMIS and Fiscal Agent Services Assessment and Strategy Project. For this project, she lead a team that assessed the performance and capabilities of the State's MMIS and fiscal agent services relative to current industry systems and standards, and developed potential MMIS re-procurement options. Additionally, Shea led the deliverable's development for this project, including the final assessment and options report, which included a SWOT analysis and a strategic assessment of the current Medicaid landscape, focusing on significant advancements in new Medicaid enterprise systems and the move to updated approaches and strategies for MMIS procurement.

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

- *Ohio Medicaid Enterprise System (OMES) IV&V Services (12/2016 to 02/2018)*
- Shea served as the CMS certification lead supporting Ohio's single state Medicaid agency, the Department of Medicaid. Shea provided IV&V services to ODM on their new modular MMIS procurement project. She managed CMS communications, focused on client relations, and led the IV&V team's certification process. Additionally, Shea helped provide ODM with crucial project health analysis; budget, schedule, and scope analysis; and risk and issue tracking for the Ohio Medicaid program as a whole.

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

- *RAPIDS (Eligibility System) Transition Facilitation Project (02/2016 to 05/2016)*
- Shea served as the project lead for the DoHS Office of Management and Information Services' (MIS') eligibility and enrollment vendor transition project. West Virginia had a condensed time frame to transition the maintenance and operations of its existing eligibility system from one vendor to another. Shea led and facilitated key knowledge transfer and the resolution of critical project issues. Additionally, she managed a team of five in supporting MIS in deliverable review, risk and issue tracking and mitigation, and executive status reporting.
- *Eligibility and Enrollment Request for Proposal (RFP) Development Assistance (10/2015 to 01/2016)*
- Shea served as the requirements manager for this project. As a member of the project management team, Shea supported the development of the approach to gather requirements from the state agencies that are targeted for inclusion in the RFP, including the Child Care system, the Statewide Automated Child Welfare Information System (SACWIS) system, the Child Support System, and the core eligibility and enrollment solution that services a variety of assistance programs including Medicaid, CHIP, SNAP, TANF, LIEAP, and other West Virginia-specific assistance programs. Shea led the requirements development process, facilitated Joint Requirements Planning (JRP) sessions, and escalated risks and issues to impacted stakeholders. Shea developed responses to vendor questions, and created the final question and answers procurement document for the engagement. She also led the development of the evaluation materials and scoring methodology for the procurement, and led and facilitated the evaluation committee during scoring sessions. Finally, Shea led the team in supporting the State with the development of the final procurement packages, including providing consulting services to both the State and the federal partners during the review of the final selection.



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

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

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



# Hope Connard, PHR, SHRM-CP

MANAGER  
Berry, Dunn, McNeil & Parker, LLC

## EDUCATION AND CERTIFICATIONS

BA, Human Resource Management, University of Arizona

Professional in Human Resources (PHR)

Society for Human Resource Management – Certified Professional (SHRM-CP)

## PROPOSED PROJECT ROLE

Project Management Support Staff

## MEDICAID EXPERIENCE

1 year

## AFFILIATIONS AND MEMBERSHIPS

- SHRM Member
- Global Organization Network (GIODN) Member

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 subject matter expert (SME) and part of the project leadership team, Hope provides guidance and support in the development of the BMS Onboarding Training Modules and BMS branded Learning Management platform. This project supports the workforce development needs as identified in OD Phase 1, and will result in a more effective and consistent approach to onboarding newly hired employees.



*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 West Virginia's single state Medicaid agency. She performs a variety of overflow engagement coordination duties, such as documentation/deliverable reviews and other project management activities.

– **Reset IV**

*HR Consulting and Advisory Services (04/2024 to 08/2024)*

As co-lead, Hope provided organizational change management expertise that supported the Organization Transformation Project.

– **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 organizational change management 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 West Virginia operations. Engaging with Kaizen groups, she focused on improving organizational effectiveness. Notably, her pivotal involvement in relocating import operations from Detroit to Charleston underscored her ability to liaise effectively between U.S. and Japan operations. Additionally, she conducted meticulous audits 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



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coordinating events for the IT sector.



**Andrew Oliver, MS, LSSGB, Prosci®  
CCP**

**SENIOR CONSULTANT**  
Berry, Dunn, McNeil & Parker, LLC



**EDUCATION AND  
CERTIFICATIONS**

MS, Public  
Administration, Central  
Michigan University  
BS, Communication,  
Western Carolina  
University  
Lean Six Sigma Green  
Belt (LSSGB)  
Prosci® Certified Change  
Practitioner

**PROPOSED PROJECT  
ROLE**

Project Management  
Support Staff

**RELEVANT EXPERIENCE**

5 years

Andrew Oliver is an experienced professional, leader, and project manager in the State Government Practice Group. His exceptional communication skills are complemented by his adeptness in harnessing technology and data to convey information with clarity and impact. Andrew excels as a project manager, collaborating closely with organizational leaders to steer projects toward successful goal attainment and the delivery of high-value outcomes. His extensive experience predominantly revolves around leading initiatives related to strategic plan development, executing effective communications campaigns, conducting comprehensive data analysis, and facilitating seamless change management within both the IT and government sectors.

**PROJECT EXPERIENCE**

**BerryDunn (07/2021 to present)**  
– Guam Department of Public Health and Social Services (DPHSS)  
*Public Health Accreditation Board (PHAB) Accreditation Coordination (02/2025 to present)*

Andrew is the lead business analyst and supports efforts to coordinate working groups, collect required PHAB documents, and identify gaps in documentation. Andrew also leads efforts to help Guam meet its initial PHAB accreditation.

*Enterprise Program Management Office (EPMO) (01/2025 to present)*

Andrew serves as the project manager for the Pharmacy Benefits Management (PBM) implementation in partnership with SGRX. He leads efforts to support Guam DPHSS in transitioning from a paper-based workflow to a digital system that automates many processes. Andrew also supports SGRX through the Medicaid Enterprise Systems (MES) certification process.

Additionally, Andrew supports Guam DPHSS in modernizing its eligibility and enrollment process for the Supplemental Nutrition Assistance Program (SNAP) through data analysis, assessments, and implementation of recommended actions. He also provides support

for efforts related to organizational change management and development, business process



redesign, and policy analysis.

– **Missouri Office of Administration (MO OA)**

*Digital Government Transformation (DGT) Program Management Services (02/2023 to 09/2024)*

*DGT Project Management Office (PMO) Support (06/2024 to 09/2024)*

Andrew was the assistant project manager and helped coordinate, plan, and track the progress of MO OA DGT projects and initiatives.

*DGT Organizational Change Management (OCM) Support (05/2024 to 09/2024)*

Andrew supported efforts to assess the OCM needs of each MO OA DGT project and provided solutions to enhance the communication experience. He played a critical role in the development of an OCM impact assessment tool, completing impact assessments across MO OA DGT projects and developing strategies to enhance OCM activities.

*Microsoft 365 (M365) Office of Change Management (08/2023 to 01/2024)*

Andrew supported MO agencies the transition to M365 applications by developing awareness through communication campaigns to build awareness, one-on-one pulse checks with agency leaders to gauge staff readiness, collecting agency use cases for pilot testing, and gathering feedback throughout the transition to improve the overall release experience.

*Enterprise Application Architecture Program (02/2023 to 04/2023)*

Andrew supported the project lead with developing and finalizing a project management plan and an engagement management plan for the Enterprise Application Architecture Program.

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

*Women, Infants, and Children (WIC) Shopping Experience Improvement Project (01/2024 to 09/2024)*

As the business analyst, Andrew supported a comprehensive evaluation and analysis of the Department's Special Supplemental Nutrition Program for WIC benefit redemption to increase WIC benefit redemption rates. The project gathered information from WIC participants and WIC staff in facilitated listening sessions; analyzed redemption data over the past five years for NH compared to other New England states; developed recommendations to improve redemption rates; conducted a cost analysis on the recommendations; and created a strategic plan with specific actions to increase the redemption rates of each NH WIC-approved food category with a cost containment strategy added to support implementation of the new food package final rule effective July 2024. As a direct result of BerryDunn's leadership and successful completion of this project, NH has defined action steps and strategies to help improve overall WIC benefit redemption rates across the state as well as in partner states.

– **West Virginia Bureau for Public Health (BPH)**

*Data Modernization Initiative and HIV and Hepatitis C Elimination Plan Project Management (09/2023 to 06/2024)*

Andrew served as the project manager and led efforts to support BPH's data governance activities, development of a data integration and interoperability strategy, and the procurement support for a systems performance management system. Additionally, as a project manager, Andrew led efforts to support BPH in managing updates and communicating progress of the HIV/Hepatitis Elimination Plan. He also led efforts to establish four task force groups aimed at achieving the goals of the state's HIV/Hepatitis Elimination Plan.

*ELC, ED, and EDE Reporting Support and Data Modernization Initiative (06/2022 to 08/2023)*





Andrew served as project manager and led development and implementation of the CDC-required assessment, prioritization, and work plan, as well as supported the newly-formed Public Health Data Governance Steering Committee and Data Stewards Council. Andrew led efforts that resulted in a data modernization plan, a workforce assessment, market and gap analysis, and workforce development plan for WV BPH.

*Electronic Vital Records System Implementation (08/2021 to 06/2023)*

Andrew served as the project manager and led support efforts for the EVRS Implementation project. Andrew provided insight into User Acceptance Testing (UAT) planning, release planning, and led process mapping efforts during the implementation of the EVRS Death Registration module.

*WIC Product Management Office (PMO) (07/2021 to 04/2023)*

Andrew supported the WIC Crossroads project with business analysis tasks specific to system reporting functionality and led efforts to assist the User Group in transitioning from The Integrity Profile (TIP) to the Food Delivery Portal (FDP) report submission process.

*Bureau for Social Services (BSS) Policy Website (09/2021 to 12/2021)*

Andrew supported the BSS Policy Website project with business analysis tasks.

**– Wyoming Department of Health (WY DOH) Public Health Division**

*Performance Management and Quality Improvement (PMQI) and Strategic Map Implementation (07/2023 to 05/2024)*

Andrew served as the deputy project manager for PM/QI and led activities to assess PHD's PM/QI needs, current ability to meet the PHAB requirements and development of PM/QI training and a resources repository.

**– Oklahoma Department of Human Services (OKDHS)**

*Technology Business Management Division Organization Structure Review (08/2023 to 11/2023)*

Andrew served as the temporary deputy project manager and led activities associated with the development and messaging of the organizational structure assessment tool as part of the discovery process.

**Maine Department of Health and Human Services (02/2019 to 07/2021)**

As data analyst, Andrew served as the lead data coordinator for the Office of Child and Family Services (OCFS). In this role, Andrew provided leadership and stakeholders with reporting, analysis, and visualization of data, resulting in data driven and informed organizational decisions. Additionally, Andrew produced reports and trend analyses of data using Oracle PL SQL and data visualization programs such as Tableau and Microsoft Excel; played a significant role in the creation, documentation, and successful launch of the organization's first public facing dashboard; and was active in the implementation, data migration, and testing strategy for the new Comprehensive Child Welfare Information System (CCWIS) that would replace the legacy system, Maine Automated Child Welfare Information System (MACWIS).

**Athenahealth (04/2014 to 05/2018)**

As a senior associate, Andrew served as the Voice of the Customer lead and liaison to the network services, patient and population health services, and social media team. In this role, Andrew evaluated data, surfacing trends to stakeholders to facilitate product improvements. He also established and implemented the population health services Voice of the Customer program at athenahealth, and successfully utilized aggregated data and presentations to influence senior leadership, R&D, and product teams. Additionally, Andrew moderated athenahealth's online client



user community, and took ownership of all client-facing self-help content creation, moderation, and workflows for the company's community forums.

In this role, Andrew also worked with product teams and marketing to research and review Centers for Medicare & Medicaid Services (CMS) Meaningful Use and Merit based Incentive Payment System (MIPS) program requirements and rule changes annually to improve support content and functionality that helps ensure clients were able to meet CMS requirements.

**Congressional and State Senate Campaigns (05/2014 to 06/2016; 02/2018 to 06/2018)**

Andrew served as social media and communication assistant for congressional and state senate campaigns. In this role, he established a presence on Facebook and Twitter for the candidate, which included managing, creating, and publishing campaign content. He effectively collaborated with candidates and campaign managers to strategize events and candidate promotion.



**April Adames, MPA, PMP®, Prosci®  
CCP**

MANAGER

Berry, Dunn, McNeil & Parker, LLC



**EDUCATION AND  
CERTIFICATIONS**

MPA, San Diego State  
University

BA, Psychology, Fort  
Lewis College

Certified Project  
Management  
Professional® (PMP®)  
Prosci® Certified Change  
Practitioner

**PROPOSED PROJECT  
ROLE**

Project Management  
Support Staff

**RELEVANT EXPERIENCE**

14 years

April Adames brings a focused ability to solve problems and manage complex tasks with dedication and efficiency, consistently meeting all project requirements, budgets, and deliverables. She is a talented project leader, with the ability to lead teams from initial project conception through final stages of implementation and testing. Her areas of expertise include program risk analysis, program methodologies, operations management, implementation management, contract management, and business process development.

**PROJECT EXPERIENCE**

**BerryDunn (06/2021 to present)**

As a manager, April works with state government public health agencies to provide services such as grant preparation and management, project management, needs assessments/gap analyses, accreditation preparation, business process analysis/redesign, organizational change management, and implementation oversight for state government public health projects.

**– Guam Department of Public Health Social Services**

*Enterprise Portfolio Management Office Project (10/2024 to present)*

April is project manager for the interoperability project. Key services include providing project management services for IT projects, performing organization change management and organizational development (e.g., leadership and staff training), redesigning business processes, and providing policy analysis and support.

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

*Immunization Strategic Planning (04/2024 to present)*

As project manager, April is leading the development of a five-year strategic plan for the Immunization Unit. Activities in the project include facilitating strategic planning meetings, conducting listening sessions to gather partner input, distributing electronic surveys, developing a five-year strategic plan, and a post implementation report.



**– New Hampshire Department of Health and Human Services**

*Women, Infants, and Children (WIC) Shopping Experience Improvement Project (01/2024 to 09/2024)*

As the project manager, April led a comprehensive evaluation and analysis of the Department's Special Supplemental Nutrition Program for WIC benefit redemption to increase WIC benefit redemption rates. The project gathered information from WIC participants and WIC staff in facilitated listening sessions, analyzed redemption data over the past five years for NH compared to other New England states, developed recommendations to improve redemption rates, conducted a cost analysis on the recommendations, and created a strategic plan with specific actions to increase the redemption rates of each NH WIC-approved food category with a cost containment strategy added to support implementation of the new food package final rule effective July 2024. As a direct result of BerryDunn's leadership and successful completion of this project, NH has defined action steps and strategies to help improve overall WIC benefit redemption rates across the state as well as in partner states.

**– West Virginia Bureau for Public Health (BPH)**

*State Health Assessment, State Health Improvement Plan, and Workforce Development Project Management Support (07/2023 to 06/2024)*

As project manager, April monitored and managed project tasks and risks for the assessments and plans required by the Preventive Health and Health Services Block Grant, CDC Public Health Infrastructure Grant, CDC OT-2103 Health Disparities Grant, and CDC Enhancing Laboratory Capacity Data Modernization Grant. The assessments included community status, community partners, and community context assessments for the state health assessment, including: job satisfaction, workforce gap analysis, and public health competency assessment for the workforce development plan and health equity plan. Project management activities included tracking progress toward established goals and objectives, coordinating project meetings, and coordinating staff to develop project deliverables.

*Infant and Maternal Mortality Review Panel Project Management Support (04/2023 to 06/2024)*

As project manager, April oversaw the development and delivery of project deliverables including state best-practice research, process maps, and procedure guides. She collaborated with the client to coordinate project meetings and monitor progress toward established project goals.

*Project Management Support for Office of Epidemiological Services (06/2021 to 06/2024)*

As project manager, April helped ensure that project milestones and deliverables were achieved. She led a team of individuals to develop and distribute sub-agreement monitoring tools for local health departments, track reporting response rate, summarize reporting outcomes for leadership, and develop recommendations for managing project risks. She helped to ensure the annual statewide kindergarten immunization survey and trainings were drafted in alignment with West Virginia goals, and that the survey was distributed per established timeline. In addition, she tracked and monitored a team of individuals' progress toward goals and objectives for data modernization initiatives.

*Fiscal Management Improvement Initiative (10/2021 to 02/2023)*

As project lead, April coordinated a team of individuals to develop and implement a fiscal management governance structure including a Fiscal Management Steering Committee and a Fiscal Management Improvement Council. She coordinated a complete assessment of fiscal management activities between finance and program staff and compiled challenges and recommendations based on assessment findings. In alignment with 2 CFR 200 Uniform



Administrative Requirements and state policies, April supported the development of staff training to guide effective federal grant and subgrantee reporting and monitoring activities.

*Announcement of Funding Availability (AFA) Process Implementation (06/2021 to 01/2022)*

As project lead, April assisted with implementing a new competitive procurement process and procedure for establishing subgrantee agreements funding by federal grants. Through coordination of tasks across a team, she drafted funding announcements, developed application scoring tools, compiled funding recommendations, created final recommendation presentations for leadership, developed quarterly subgrantee monitoring tools, and provided technical assistance to staff.

**County of San Diego, CA Health and Human Services Agency (07/2013 to 08/2019)**

**– Behavioral Health Sciences (07/2017 to 08/2019)**

As an administrative analyst, April provided overall leadership and oversight of daily contract monitoring activities, administrative support, and program management for behavioral health and substance use programs. Her responsibilities included coordinating procurement activities, contracting, and invoicing, team and cross-functional management, and technical assistance/support liaison. She also proactively monitored invoice reviews, site visits, and monthly/quarterly progress reports with contractors, and assisted with developing corrective action plans and resolved discrepancies in contract performance.

**– Housing and Community Development Services (07/2014 to 07/2017)**

April provided technical leadership and oversight of daily configuration, operational support, project management, and reporting functions for supportive housing programs. She strategically managed numerous programs through the development of program goals, tracking progress, meeting deadlines, and monitoring overall delivery. She also conducted investigative research and legislative analysis for housing programs. She coordinated and organized collaborative meetings with community partners and interagency, in addition to event planning and program announcements. She oversaw self-sufficiency programs and supported referrals to support services, including Medi-Cal, California's Medicaid/Medicare program.

**– Chief Administrative Office, Management Fellow (07/2013 to 06/2014)**

As a management fellow, April supported Countywide homeless initiatives by performing strategic program expenditure analysis. She led the development of internal reports for the Chief Administrative Office, and coordinated and attended internal strategic planning meetings, initiating efforts for developing relationships with the community. Partnered effectively with senior leadership to drastically improve relations across multiple agencies and departments.

**Veterans Village of San Diego (2012 to 2013)**

April served as a veteran's family case manager, supporting the Veteran Affairs Grant Per Diem program at a local Transitional Living Facility. She assisted and collaborated with clients in the development of case plan goals and objectives in conjunction with program requirements, coordinated efforts with external agencies, Medi-Cal, and community members to properly market client referrals, and properly evaluated client's adherence to program policies, instituting incentives to reach levels and goals within the program.

**Alvarado Parkway Institute (2011 to 2012)**

April assisted clients and clinical staff members as a mental health professional. She proactively assisted clients in attaining daily living needs and monitoring of mentally ill crisis patients for safety in a therapeutic milieu, and supported encouragement of regular and healthy living practices, indicating compliance with medication regimens.



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**Axis Health System (2009 to 2011)**

**– Residential Counselor**

April led the development of treatment plans based on client strengths. She assisted in crisis management and stabilization, boasting of healthy living skills, and instilling proper medication management. She also directed Dialectical Behavior Therapy groups and dual-diagnosis groups.

**– Detoxification Counselor**

April simultaneously partnered with a team of alcohol and drug treatment professionals, providing a variety of services such as: client basic needs assessment, service planning, referrals to outside agencies, client advocacy, service provision monitoring, and crisis control.



## Rebecca Moore, MS, Prosci® CCP, LSSGB

SENIOR MANAGER

Berry, Dunn, McNeil & Parker, LLC



### EDUCATION AND CERTIFICATIONS

MS, Oklahoma State University

Bachelor's Degree, Eastern New Mexico University

Certificate in Public Health Informatics, Johns Hopkins Bloomberg School of Public Health  
Prosci® Certified Change Practitioner

Lean Six Sigma Green Belt (LSSGB)

American Project Management, Project Management Masters' Certification Program

### AFFILIATIONS AND MEMBERSHIPS

- Governor's Executive Development Program for State Officials
- Oklahoma Public Health Leadership Institute

### PROPOSED PROJECT ROLE

Rebecca Moore is a senior manager in BerryDunn's State Government Consulting Group who leads the Health Information Technology (HIT) Practice. Rebecca has more than 24 years of experience working in various project manager, data analyst, informatics, and leadership roles with the State of Oklahoma Department of Health and Department of Mental Health and Substance Abuse Services. Rebecca also served as the State of Oklahoma Health Information Exchange (HIE) Director for several years.

### PROJECT EXPERIENCE

#### BerryDunn (06/2021 to present)

##### – Guam Department of Public Health Social Services

*Guam Department of Public Health Social Services (DPHSS)  
Enterprise Portfolio Management Office (EPMO) (10/2024 to present)*

Rebecca is serving as an engagement manager under the EPMO for DPHSS. Key services include providing project management services for several IT projects (e.g., eligibility and enrollment system, interoperability/health information exchange), performing organization change management and organizational development (e.g., leadership and staff training), redesigning business processes, and providing policy analysis and support.

##### – Hawai'i Public Utilities Commission (PUC)

*Contract Administration and Oversight Services (04/2024 to present)*

Rebecca is serving as the program director for the Contract Administration and Oversight Services for PUC's selected third-party service provider (TPSP). Key activities include developing key performance measures, reviewing and approving the contract monitoring plan and reports, facilitating performance review meetings, and reviewing deliverables and reports provided by the TPSP.

##### – Oregon Health Authority (OHA)



Project Management Support Staff      *Independent Quality Management Services (iQMS) for Laboratory Information Management System (LIMS) Replacement Project (04/2024 to present)*

**RELEVANT EXPERIENCE**      Rebecca is serving as the iQMS project engagement manager for the LIMS Replacement project. Key activities include contract management, overseeing the BerryDunn team and helping to ensure

27 years

members have the necessary resources to successfully deliver all services, participating in key meetings and presentations, guiding development of deliverables, providing public health programmatic, IT, and data systems planning and procurement subject matter expertise, and providing iQMS subject matter expertise.

*iQMS for Compass Modernization Portfolio Projects (02/2022 to present)*

Rebecca is serving as the iQMS project lead for the Behavioral Health Data Warehouse and Measures and Outcomes Tracking System Replacement projects as part of the Compass Modernization Portfolio. Key activities include project management, conducting initial and ongoing risk assessments, quality planning, conducting quality control reviews of OHA's project documents and the implementation vendors' deliverables, and developing periodic quality status reports and quarterly quality assurance and improvement reports.

– **Oklahoma Department of Human Services (OKDHS)**

*Digital Transformation Office (DTO) Organizational Change and Organizational Development Services (01/2024 to present)*

Rebecca is serving as the project manager for the organizational change management (OCM) services to support the OKDHS DTO Optimization Project. Key activities include conducting change readiness surveys and listening sessions, developing and executing an OCM plan, conducting readiness maturity assessments, and developing an OCM knowledge transfer plan and an OKDHS OCM program and resource plan.

*Technology Business Management Division Organization Structure Assessment (07/2023 to 12/2023)*

Rebecca served as the project manager and subject matter expert (SME) for this project. Key activities include gathering information through a web survey and discovery sessions, conducting an environmental scan, analyzing results and documenting findings, and developing recommendations for the Technology Business Management Division organization structure.

– **Oregon Department of Early Learning and Care (DELIC)**

*iQMS for Provider Management Project (12/2023 to present)*

Rebecca is serving as the iQMS engagement manager for the Provider Management Project. Key activities include serving as the primary contact for the engagement, supporting the project lead in managing the project, participating in risk assessment and quality planning, and conducting quality reviews of the iQMS deliverables.

– **Alaska Division of Public Health (DPH)**

*Data Modernization and Informatics Initiative Strategic Planning (08/2022 to present)*

Rebecca is serving as the project lead and SME for the DPH data modernization and informatics strategic planning project. Key activities include research of data governance frameworks and informatics organizational structures including peer state interviews, leading





efforts in information gathering through web surveys, and developing a Data Modernization Plan, Workforce Development Plan, and Informatics Strategic Plan.

– **Iowa Health and Human Services (IA HHS)**

*Corporation Technology Cost Allocation Project (12/2023 to 09/2024)*

Rebecca is serving as the engagement manager for the Corporation Technology (CorpTech) Cost Allocation Project. Key activities include serving as the primary contact for the engagement, supporting the project manager, working to ensure the project team has the necessary resources, and serving as a SME on cost allocation for shared solutions.

*Patient Access and Interoperability (PAI) Implementation (07/2022 to 02/2024)*

Rebecca served as the project lead for the IA HHS PAI project. Key activities included collaborating with the PAI contractor's project manager, monitoring the contractor for contract compliance, and facilitating communication between IA HHS and the contractor.

– **West Virginia Bureau of Public Health (BPH)**

*Data Modernization Initiative and HIV and Hepatitis C Elimination Plan Project Management (09/2023 to 06/2024)*

Rebecca served as a SME for the development of the WV BPH Data Integration and Interoperability Strategy and provided support for the shared data governance structure for BPH and the Office of Management Information Services.

*Enhancing Laboratory Capacity-Enhancing Detection (ELC-ED) Project Management (06/2021 to 07/2023)*

Rebecca served as the lead for the development of an Enterprise Surveillance System Request for Proposal (RFP) and as a SME on the development of the Data Modernization Initiative Plan. Key activities included performing market research, facilitating vendor demonstrations, facilitating requirements development sessions, and developing IT system requirements, service level agreements, and deliverables and an RFP. Additional key activities include developing a shared data governance structure for BPH and Office of Management Information Services and developing a Data Modernization Plan.

– **Alaska Department of Health Section of Public Health Nursing (PHN)**

*Electronic Health Record (EHR) Planning and Procurement (05/2023 to 05/2024)*

Rebecca served as the project manager for the procurement phase of the EHR Planning and Procurement Project. Key activities included conducting a needs assessment and business process planning; procurement planning including the development of functional and technical requirements, a market and fit-gap analysis, and the RFP for solicitation; facilitation support for vendor demonstrations; and post-solicitation support to support vendor/contract management.

– **Hawai'i Division of Vocational Rehabilitation (HDVR)**

*Contracting and Procurement Support and Process Improvement Project (06/2023 to 12/2023)*

Rebecca served as the engagement manager and project lead for the HDVR contracting and procurement support and process improvement project. Key activities included managing the project tasks, research of background documentation, participating in information gathering activities through visioning and discovery sessions, developing procurement documentation (e.g., Requests for Information [RFIs] and RFPs), contract monitoring, and developing process improvement documentation.



– **Alaska Department of Health (DOH) and Department of Family and Community Services (DFCS)**

*IT Governance Needs Assessment and Roadmap Development (08/2022 to 11/2023)*

Rebecca served as the project lead and SME for the DOH and DFCS IT governance project. Key activities included project management, facilitating or participating in discovery sessions and peer state interviews, and leading development of a Needs Assessment and IT Governance Roadmap. Additional activities included identifying and documenting necessary updates to the DOH IT privacy and security policies to help ensure DOH policies were in compliance with State and federal standards, and updating and streamlining the DOH IT procurement documents.

– **Alaska Department of Health (DOH)**

*HIE Planning and Procurement (08/2021 to 09/2023)*

Rebecca served as the project manager for the BerryDunn team supporting DOH in procurement of an HIE management and technology solution. Key activities included conducting market research, facilitating discovery sessions, conducting a needs assessment, developing functional and technical requirements, developing the RFP and vendor evaluation materials, supporting the procurement process, and conducting post-procurement activities including providing support for the development and submission of the operations advance planning document update (OAPD-U), deliverable review and feedback, and training of DOH staff to assume the role of contract monitor.

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

*Institutions of Mental Disease (IMD) Waiver HIT Implementation Requirements Strategic Planning (05/2023 to 06/2023)*

Rebecca served as the project lead for the HCA IMD Waiver HIT implementation requirements strategic planning project. Key activities include research of background documentation, leading efforts in information gathering through visioning and discovery sessions and developing an IMD Waiver HIT Requirements Strategic Plan and Roadmap.

**Oklahoma State Department of Health (10/2020 to 05/2021)**

As an operations strategy and reporting specialist, Rebecca managed the move of 900 staff to a new building by managing the move schedule and collaborating with movers and the IT project manager. She also led the development of the Operations Strategic Plan and the identification of processes for improvement and development of automated processes for building management and financial services.

**Oklahoma Office of Management and Enterprise Services (10/2014 to 05/2021)**

Rebecca served as the State HIE director. This included serving as lead in establishing a statewide HIE through the collaboration of State and private organizations and stakeholders. She planned, managed development of, and executed a 10-year strategic plan, and was the lead in establishing the HIT Advisory Board.

Serving as the Director of Data Driven Services, Rebecca led the implementation of COVID health applications including antibody testing scheduler, contact tracing, and case investigation for the Oklahoma State DOH while collaborating with Google, Salesforce, and MTX. She also led the implementation of unemployment data reporting tools in collaboration with the Oklahoma Employment Security Commission and Microsoft Services.

**Oklahoma State Department of Health (09/2013 to 03/2020)**

As the Director of Informatics, Rebecca led the development of the new Informatics Division. She established an advisory council; developed division strategic plan and staffing plan to include 13



staff to service the informatics needs of the agency including policy, privacy, and security; data governance; and enterprise services management. She also helped to ensure that the Informatics Division adhered to Public Health Informatics Institute's competencies; served as product owner of multi-agency interoperability solution to support modern, efficient, and effective government; supported the development of policies to establish pricing for public health services provided to Medicaid members; served as a liaison between agency and consolidated information technology agency; and served as agency representative on Oklahoma HHS multi-agency shared services governance committee and Data Governance Sub-committee. Under the Oklahoma Health and Human Services Cabinet, partnered with the **Oklahoma Health Care Authority (2014 – 2020)** to develop APDs to request federal funding to support and enhance public health data submissions and fund the development of the multi-agency interoperability solution and implement a master person index..

#### **University of Central Oklahoma (08/2010 to 07/2016)**

Rebecca served as an instructor for College Algebra for Science Majors and Introductory Statistics for the Sciences. She was responsible for the development of curriculum, syllabi, and exams; grading; and classroom instruction.

#### **Oklahoma State Department of Health (08/2007 to 09/2013)**

As the data warehouse and enhancement coordinator, Rebecca managed informatics needs assessment, led the development of state agency enterprise systems, led the search and selection of state agency interoperability system vendor, and supervised geographic information services (GIS) and web-based data query system staff.

#### **Oklahoma State Department of Mental Health and Substance Abuse Services (04/1997 to 08/2007)**

Rebecca served as the analytics lead on substance abuse treatment outcome study; mental health and substance abuse needs assessment; and mental health services transformation project. She mined data to uncover insights and identify outcomes to drive policy, worked with SAS and SQL to develop shell scripts for task automation, prepared data examples and report for agency leadership, and managed federal grants and vendor contracts.

#### **PUBLICATIONS**

- Acevedo A, Garnick DW, Lee MT, Horgan CM, Ritter G, Panas L, Davis SD, Leeper T, Moore R, Reynolds M (2012): *Racial and Ethnic Differences in Substance Abuse Treatment Initiation and Engagement*, *Journal of Ethnicity in Substance Abuse*, 11:1, 1-21.
- Pridemore, W.A., Damphousse, K.R., & Moore, R.K. (2007). *Interview mode effects on estimates of need for alcohol and drug treatment among welfare recipients: Evidence from a quasi-experiment*. *Journal of Experimental Criminology*, 3(4), 323-336.
- Garnick, D., Horgan, C., Lee, M., Panas, L., Ritter, G., Davis, S., Leeper, T., Moore, R., Reynolds, M. (2007). *Are Washington circle performance measures associated with decreased criminal activity following treatment?* *Journal of Substance Abuse Treatment*, 33(4), 341-352.
- Pridemore, W.A, Damphousse, K.R., Moore, R.K.(2005). *Obtaining sensitive information from a wary population: A comparison of telephone and face-to-face surveys of welfare recipients in the United States*. *Social Science & Medicine*, 61,976-984.
- TOPPS-II Interstate Cooperative Study Group, (2003). *Drug treatment completion and post-discharge employment in the TOPPS-II Interstate Cooperative Study*, *Substance Abuse Treatment*, 25.



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- Pandiani, J.A., Banks, S.M., Bramley, J., Moore, R. (2002) *Cross State Comparison of Mortality for Mental Health Service Recipients*. *Psychiatric Services*, 53, 8.
  - Hendryx, M.S., Moore, R., Leeper, T., Reynolds, M., Davis, S. (2001). *An Examination of Methods for Risk-Adjustment of Rehospitalization Rates*, *Mental Health Services Research*, 3 (1).



partners, engaging state, community, and other interested parties, performing research, analyzing assessment results, and making recommendations that can be used to support the development of the Mississippi state plan for rehabilitation services.

– **Iowa Health and Human Services (IA HHS)**

*Corporation Technology Cost Allocation Project (12/2023 to 09/2024)*

John served as an analyst for the Corporation Technology (CorpTech) Cost Allocation Project. Key activities included supporting the project manager, developing deliverables, and working to help ensure the project team was adequately supported throughout the entirety of the project.

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

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

John served as a program analyst on this project and helped to facilitate department leadership discussions; engage state, community, and other interested parties; perform research; analyze assessment results; and develop recommendations that can be used to support the development of a State Plan on Aging. Additionally, John supported this team by working with department leaders in identifying their vision and goals for the future of aging and independent living services in the Commonwealth of Kentucky.

– **Alaska Division of Behavioral Health**

*988 Suicide and Crisis Lifeline IT Solution Planning (10/2023 to 04/2024)*

John served as a business analyst on this project for the evaluation of current and future needs in crisis call centers to improve coordination of care between the crisis call centers, mobile crisis teams, and other response teams. Key project activities included performing a needs assessment, exploring the existing funding sources to support 988 implementation, and conducting an alternatives analysis to identify the best-fit IT solution in implementing the 988 Suicide and Crisis Lifeline across Alaska.

– **Oklahoma Human Services**

*Technology Business Management Division Organization Structure Review (07/2023 to 12/2023)*

John served as a business analyst for this project. Key activities included developing and gathering information through a web survey and discovery sessions, conducting an environmental scan, analyzing results, and documenting findings, and developing recommendations for the Technology Business Management Division organization structure.

– **Alaska Division of Public Health (DPH)**

*Data Modernization and Informatics Initiative Strategic Planning (10/2022 to 12/2023)*

John served as a business analyst for the DPH data modernization and informatics strategic planning project. Key activities included research of data governance frameworks and informatics organizational structures, analysis of information gathered through web surveys, and supporting the development of a data modernization plan, workforce development plan, and informatics strategic plan.

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

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

John served as a business analyst for this project, which included reviewing policies, regulations, staffing, and processes for ADHS' licensing HCIs and development of an operational assessment report to better understand the strengths and challenges related to current operations and provide recommendations for improvement. The report also addressed potential risks, barriers,



constraints, and opportunities for ADHS to consider during implementation.

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

*Health Information Technology (HIT)/Health Information Exchange (HIE) Support Services (10/2022 to 03/2023)*

John served as a business analyst for this project to provide supporting project management services for the planning and implementation of an HIE. In addition, BerryDunn developed Advanced Planning Documents (APDs) to request funding from Centers for Medicare & Medicaid Services (CMS), providing outcomes-based certification support, and leading the development of Puerto Rico's State Medicaid Health IT Plan (SMHP).

**Social Epidemiology Research Lab (04/2022 to 09/2022)**

As research and program management intern, John's primary responsibilities included administering logistical support for initiatives relating to participant recruitment, retention, and engagement. He coordinated various media campaigns targeting students to inform them of the latest updates relating to COVID-19. He presented biweekly findings of over 80 literary reviews concerning health determinants to best maximize research efforts.

**Community Action Partnership of Orange County (09/2021 to 03/2022)**

As program planning intern, John's primary responsibilities included orchestrating the design and implementation of new initiatives and programs pertaining to affordable housing via marketing, outreach efforts, and empirical research. He spearheaded the development of the agency's 2021 community needs assessment and presented it to invested stakeholders, executive planners, and partnering organizations. John conducted large-scale community demographic reports identifying risk factors to better allocate financial resources.

**Global Medical Brigades (04/2021 to 01/2022)**

As program coordinator, John facilitated a remote health brigade in Athens, Greece to administratively aid medical professionals in the development of treatment plans, medical diagnosis, and referrals. He strategically designed a population-specific oral hygiene program for refugee families to familiarize themselves with basic hygienic procedures before or after dental appointments.

**Center for Student Health and Wellness (03/2020 to 06/2021)**

As peer health educator, John organized health and wellness promotional events on campus to educate students on relevant health topics. He planned weekly workshops addressing health concerns expressed by the student body to inform them of available resources as well as scientifically backed methods of self-help.

**Tweet2Quit Campaign (06/2020 to 10/2020)**

As data research assistant, John analyzed and categorized up to 1,000 tweets a week as part of a clinical research study focused on helping people abstain from smoking by using twitter support groups and chat bots. He collected supplemental research on existing chatbot applications and fabricated keywords to an AI bot on how to respond to varying tweets.



**Kohnyr Smith, MBA**

CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

**EDUCATION AND CERTIFICATIONS**

MBA, University of Denver, Daniels College of Business

BS, Business Administration, Regis University, Anderson College of Business

**PROPOSED PROJECT ROLE**

Project Management Support Staff

**MEDICAID EXPERIENCE**

1 year

Kohnyr Smith brings experience in Medicaid enterprise systems, IV&V, financial management, and events. She is adept at project administration, social media content, and project support.

**PROJECT EXPERIENCE**

**BerryDunn (02/2025 to present)**

Kohnyr is a consultant in BerryDunn’s Medicaid Practice Group (MPG).

**Delaware Department of Health and Social Services (DHSS), Division of Medicaid and Medical Assistance (DMMA)**

*APD Consulting Project (04/2025 to present)*

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

**United States Virgin Islands Department of Human Services**

*Enterprise Portfolio Management Office (EPfMO) Project (04/2025 to present)*

Kohnyr serves as a business analyst for the EPfMO project. Kohnyr supports the development, updating, and tracking of USVI APDs. In her role, Kohnyr drafts APD documents and budgets, supports the project management of APD development, and helps to assure project goals and objectives are met. In addition, she helps identify and track project risks, issues, decisions, and action items for state leadership.

**Puerto Rico Medicaid Program (PRMP)**

*Enterprise Objective Monitoring and Control (EOMC) Services (03/2025 to present)*

Kohnyr serves as a business analyst for the PRMP EOMC Services project, which includes developing, updating, and tracking of PRMP APDs. In her role, Kohnyr provides input and design in the drafting of APD documents, MDBT files, and project templates. In addition, she helps identify and track project risks, issues, decisions, and action items for state leadership.

**Public Knowledge (07/2023 to 07/2024)**

– Colorado Department of Health Care Policy and Financing



#### *IV&V Services*

Kohnyr provided periodic IV&V services for the CO Department of Health Care Financing and Policy, CO's single state Medicaid agency, for Medicaid Management Information System (MMIS) module and procurement oversight. Kohnyr's support included internal team support, research, and note-taking during meetings to help ensure all important points were captured accurately.

#### *Colorado Enterprise Test Vendor Procurement*

Kohnyr helped to draft and release a Request for Proposals (RFP) to secure Enterprise Testing services, encompassing the planning, execution, and monitoring of integrated system testing across all Colorado Medicaid Enterprise System (MES) contractors. Kohnyr's support included reviewing statements of works, providing research into procurement vehicles, assisting with the proposal evaluation process, and participating in strategic meetings.

#### **Edward Jones (10/2022 to 07/2023)**

As an executive assistant to the financial advisor, Kohnyr supported the financial advisor through calendar management and meeting scheduling. Kohnyr also facilitated annual charity donations and client giftings.

#### **The Bridal Collection (08/2022 to 10/2022)**

Kohnyr served as a sales and marketing rotational development program assistant. She maintained a 60% closing ratio during sales rotations, built and maintained relationships with high-net-worth clients, and created viral content for all social media channels.





**Laura Perez, MPA, Prosci® CCP**

SENIOR CONSULTANT  
Berry, Dunn, McNeil & Parker, LLC

**EDUCATION AND  
CERTIFICATIONS**

Master of Public  
Administration, Arizona  
State University  
BS, Political Science,  
Arizona State University  
Certified Public  
Management, Arizona  
State University  
Prosci® Certified Change  
Practitioner

**PROPOSED PROJECT  
ROLE**

Project Management  
Support Staff

**MEDICAID EXPERIENCE**

2 years

Laura Perez is a senior consultant in BerryDunn’s State Government Practice Group with strong leadership, project management, and organizational skills. She brings to this engagement experience liaising between stakeholders, organization leadership, and employee teams to achieve successful project outcomes. In her work, she has demonstrated success in gathering comprehensive data and then organizing visual management metrics accessible to executive leaders to show progress on division goals and objectives.

**KEY QUALIFICATIONS**

- Experience communicating policy changes and possible impacts to business to teams, as well as conducting communication with executive leaders, stakeholders, and the public
- Strong organizational background developed by coordinating multiple, shifting, and demanding deadlines to meet standards
- More than 10 years of experience working in state government

**PROJECT EXPERIENCE**

**BerryDunn (03/2022 to present)**

– **Guam Department of Public Health and Social Services (DPHSS) Enterprise Program Management Office (EPMO) Eligibility and Enrollment (E&E) Transformation Project (10/2024 to present)**  
Laura is serving as project manager on this project to provide project management and conduct a needs assessment for the planning and implementation of an E&E solution for Medicaid and other social services/economic assistance programs.

– **Washington Health Care Authority (HCA) Community-Based Residential Treatment Facilities Project Management Services (06/2024 to present)**  
Laura is serving as project manager on this project to provide project management and interested party engagement support for HCA’s project to establish community-based behavioral health services in Tukwila, Washington, in collaboration with the Department of Social and Health Services. Key activities include developing a project management plan, project schedule, interested party engagement plan, and communication plan; steering committee planning and facilitation; and coordination and input into key project documents.



Prior to June 2024, Laura served as deputy project manager on this project to provide project management and interested party engagement support for HCA's project to establish community-based residential treatment facilities in two Washington counties, in collaboration with the Tulalip Tribes. Key activities include developing a project management plan, project schedule, interested party engagement plan, and communication plan; work group planning and facilitation; and coordination and input into key project documents.

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

*Comprehensive Statewide Needs Assessment Project Management Services (06/2024 to present)*

Laura is serving as deputy project manager and SME on this project facilitating discussions, engaging state, community, and stakeholders, performing research, analyzing assessment results and developing future recommendations and a roadmap. Laura is supporting this team with identifying the vision and goals of the Office of Vocational Rehabilitation (OVR) and Office of Vocational Rehabilitation for the Blind (OVRB) for the future of individuals with disabilities in Mississippi that can help inform the future recommendations to achieve this future state.

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

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

Laura served as program analyst and SME on this project facilitating department leadership discussions, engaging state, community, and stakeholders, performing research, analyzing assessment results and making recommendations that can be used to support the development of a State Plan on Aging. Laura supported this team with the development of the State Plan on Aging and working with department leaders in identifying their vision and goals for the future of aging and independent living services in the Commonwealth of Kentucky.

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

*Afghan Refugee School Impact (RSI) Services Needs Assessment and Performance Management and Reporting (03/2023 to 02/2024)*

Laura served as a program analyst on this project and supported this team with engaging with stakeholders, performing research, making recommendations, and developing a needs assessment that focuses on improving the academic performance and successful integration of eligible Afghan refugee children and youth through facilitating education access in public schools.

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

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

Laura served as a senior analyst for the project, reviewing policies and procedures, regulations, and staffing for ADHS' licensing HCI's and development of an operational assessment report focused on understanding the strengths and challenges related to current operations and providing recommendations for strengthening of the department's performance. The report addressed potential risks, barriers, constraints, and opportunities for ADHS to consider during implementation.

– **Missouri Department of Mental Health (DMH)**

*Business Process Redesign and Organizational Development Project (06/2022 to 05/2023)*

Laura worked as a project manager on this team supporting DMH in the future procurement of an Electronic Health Record (EHR) solution. Key activities included supporting and leading the development of three key deliverables: an Organizational Change Management plan, Organizational Development Plan, Performance Measurement and Monitoring Plan, and Knowledge Transfer activities to support the future implementation of the EHR solution.

– **Virginia Department of Behavioral Health and Developmental Services**

*Discharge Assistance Program (DAP) Rate Setting Engagement (11/2022 to 04/2023)*



Laura served as subject matter expert, completing research and recommendations for DBHD.

– **Oregon Department of Environmental Quality (DEQ)**

*Strategic Planning Initiative (04/2022 to 12/2022)*

Laura served as a business analyst on this project assisting the DEQ with development of a five-year strategic plan that incorporates key goals such as integration with state public health agencies and diversity, equity, and inclusion efforts. Key project activities include gathering information from a broad group of stakeholders, performing an environmental scan, developing a stakeholder assessment and recommendations report, facilitating strategic planning meetings with the project steering committee and DEQ leadership, developing the strategic plan, and developing an implementation plan and implementation monitoring plan.

– **Hawai'i Office of Language Access (OLA)**

*Consulting Services for On-Site Language Access Compliance Monitoring Program (06/2022 to 10/2022)*

Laura served as project manager on this project, which included engaging with OLA interested parties, performing best practices research, making recommendations, and developing a scope of work for an on-site compliance monitoring program for state agencies focused on improving equity and access to language access services for individuals with limited English proficiency.

**Arizona Department of Economic Security (05/2011 to 03/2022)**

*Area Program Manager (08/2018 to 03/2022)*

Laura managed and coordinated the Department of Economic Security (DES), Division of Developmental Disability (DDD), Support Coordination functions with emphasis on programming to help ensure all federal and State requirements were met. Laura coordinated with the DDD network department to help ensure services and providers were acquired timely to meet the needs of DDD members. Laura oversaw six teams providing coordination of care to individuals with disabilities to help ensure timely delivery and holistic coordination of services. In this role, Laura hired, trained, directed, monitored, and evaluated staff to help ensure that they were qualified and capable of meeting performance standards. She developed, approved, and implemented strategies, objectives, policies, procedures, and guidelines to meet contractual obligations with funding sources. In addition, she researched and took appropriate actions regarding investigative reports, licensing reports, and grievances and appeals by delegating appropriate responsibilities to staff.

*Human Service Unit Supervisor (12/2015 to 08/2018)*

Laura supervised and directed work activities of staff; provided necessary training; and provided technical advice and assistance to staff regarding development, implementation, and monitoring of member coordination of care. Additionally, she reviewed cases assigned to her work unit; assessed needs and assigned cases to staff members based on their experience. Laura also reviewed Individual Support Plans (ISPs) developed by Case Managers to help ensure member needs were met.

*Human Service Specialist (05/2011 to 12/2015)*

Laura conducted on-site visits to members' homes, schools, and program sites to develop relationships and discuss service needs and supports. Laura supported diverse members and families in the metro Phoenix area including Spanish speaking, refugee, immigrant, and Native American families. She developed, wrote, reviewed, monitored, and evaluated ISPs in accordance with mandated timelines, and documented individual progress and concerns. After completing these tasks, Laura arranged appropriate referrals to community agencies. Laura's work in this role also included conducting research to identify available resources in the community to meet needs identified in ISP and to inform members of resource options. Additionally, she collaborated with community agencies to aid and support members and families in crisis.



## Megan Blount, MBA

CONSULTANT  
Berry, Dunn, McNeil & Parker, LLC

### EDUCATION AND CERTIFICATIONS

MBA, University of Charleston  
BS, Communications, West Virginia State University  
West Virginia Division of Personnel (DOP) Trainer Certification

### PROPOSED PROJECT ROLE

Project Management Support Staff

### MEDICAID EXPERIENCE

4 years

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

### KEY QUALIFICATIONS

- 10+ years of Microsoft Office experience
- 10+ years of customer and client relations
- Five years of Google Workspace experience
- More than four years of project coordination experience
- Business analysis, data analysis, and research
- Training creation and delivery

### PROJECT EXPERIENCE

#### BerryDunn (04/2021 to present)

– West Virginia Bureau for Medical Services (BMS)  
IT Control Environment Review (07/2024 to present)

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

*Certified Community Behavioral Health Clinics (CCBHC) State Plan Amendment (SPA) Project (03/2024 to present)*

Megan provides project coordination, tracks action items, schedules meetings, and develops and reviews deliverables.

*Advanced Planning Document (APD) Assistance (05/2023 to present)*

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



*Payment Error Rate Measurement (PERM) Project (04/2021 to present)*

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

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

Megan provided project coordination, deliverable development and review, and tracked action items. Megan was involved with the creation of the Communications Plan and assisted in creating trackers in SharePoint Online for project documents.

*System Development Life Cycle (SDLC) Coordination Project (06/2024 to 10/2024)*

Megan provided project coordination, tracked action items, scheduled meetings, and developed and reviewed deliverables.

*Data Improvement Project (06/2021 to 06/2024)*

Megan provided project coordination, tracked action items, scheduled meetings, and developed and reviewed deliverables.

*Organizational Development Project (07/2022 to 10/2023)*

Megan provided project coordination, tracked action items, scheduled meetings, and developed and reviewed deliverables.

*Provider Management Support (PMS) Project (11/2021 to 03/2023)*

Megan provided project coordination, deliverable development and review, and monitored risks and issues related to all sub-projects within PMS. Megan was involved in the coordination of the Multistate Collaborative Forum to discuss current and future business needs for the purpose of knowledge sharing, lessons learned, and leverage and reuse.

*Fee Schedule and Edit Quality Review Project Phases IV and V (04/2021 to 02/2023)*

Megan provided project coordination, tracked action items, scheduled meetings, and developed and reviewed deliverables.

*Third-Party Liability Post Implementation (01/2022 to 03/2022)*

Megan provided project coordination, tracked action items, scheduled meetings, and developed and reviewed deliverables.

*Third-Party Liability Options Analysis and Procurement Assistance Project (04/2021 to 06/2021)*

Megan provided project coordination, tracked action items, scheduled meetings, and developed and reviewed deliverables during the implementation phase of the project.

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

*Child Welfare Initiatives Project Management Services Phase III (12/2021 to 02/2022)*

Megan provided project coordination, deliverable development and review, and tracked action items, as needed.

**West Virginia State Tax Department (10/2019 to 04/2021)**

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

**Thyssenkrupp Elevator (TKE) (10/2018 to 01/2019)**

Megan served as the operations coordinator for new installation and modernization. In this role, she provided project level administrative support (i.e., meeting organization, distribution of information, meeting minutes), acted as point of contact for mechanics and subcontractors as



directed by management, and assisted in documentation management.

**West Virginia State University (WVSU) (06/2013 to 10/2018)**

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

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

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

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

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

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



## Skye Kwong

CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



### EDUCATION AND CERTIFICATIONS

BA, Economics and Biology, Morrissey College of Arts and Sciences, Boston College

### PROPOSED PROJECT ROLE

Project Management Support Staff

### RELEVANT EXPERIENCE

2 years

Skye Kwong is an experienced consultant in BerryDunn's State Government Consulting Group, specializing in public health and project management engagements and supporting assessments, strategic planning, and data analysis. She excels in performing research, coordinating engagement activities, monitoring and reporting tasks, and developing deliverables.

### 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 eligibility and enrollment (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 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)



**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.

**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.



## Hailey Holden

STAFF CONSULTANT  
Berry, Dunn, McNeil & Parker, LLC

### EDUCATION AND CERTIFICATIONS

BA, Psychology, Purdue University

### PROPOSED PROJECT ROLE

Project Management  
Support Staff

### MEDICAID EXPERIENCE

2 years



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.

### KEY QUALIFICATIONS

- More than 10 years of experience providing solution-focused coordination
- More than 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 Medicaid Practice Group. Hailey supports a variety of practice group initiatives, including supporting the BerryDunn Medicaid Learning Center, West Virginia Operations Improvement Team, and Medicaid Practice Group Resource Library.

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

##### *West Virginia Engagement Coordinator (07/2022 to present)*

As the engagement coordinator, 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 e-Learning courses for BMS.*



*Advanced Planning Document (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 West Virginia and the United States Virgin Islands, including support with compiling and reviewing APDs.

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

Hailey served as an adolescent lead social caseworker IV to provide intensive casework services to families and children. She developed productive working relationships with reluctant clients, establishing positive rapport and creating collaborative partnerships between all involved parties. Hailey successfully identified 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 e-Learning 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.



## Cate Poling

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

### EDUCATION AND CERTIFICATIONS

BA, emphasis in English Literature, Marshall University

Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT + MCMP II)

Poynter ACES Certificate in Editing

### PROPOSED PROJECT ROLE

Project Management Support Staff

### MEDICAID EXPERIENCE

3.5 years



Cate 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, Requests for Proposals (RFPs), meeting agendas and notes, and other project documentation. She presents a well-developed understanding of project and system requirements as it relates to Medicaid Enterprise system privacy and security architecture and standard security frameworks, such as National Institute of Standards and Technology (NIST) 800-53 and Minimum Acceptable Risk Standards for Exchanges (MARS-E). She demonstrates proficiency with Microsoft, Google, and Atlassian tool suites. Additionally, Cate works to promote quality and inclusivity in language, communication, and the workspace as a Poynter ACES certified editor and co-chair of one of the firm's Employee Resource Groups (ERGs).

### KEY QUALIFICATIONS

- Extensive experience with drafting, preparation of, review cycles, and submission of key client service deliverables, including executive and Centers for Medicare & Medicaid Services (CMS) status reports, Scopes of Work (SOWs), Advance Planning Documents (APDs), and RFPs
- Over three years of experience providing research and business analysis support to a single state Medicaid agency for large-scale enterprise system implementation and maintenance and operations projects

### PROJECT EXPERIENCE

#### BerryDunn (06/2021 to present)

As a consultant, Cate supports a variety of critical West Virginia and Iowa state Medicaid agency projects and initiatives across various realms, such as project management, project coordination, subject



matter expertise, and enterprise operational process oversight assistance. Additionally, she helps support the West Virginia Operations Process Improvement Team in its efforts to develop, streamline, and circulate new and improved business processes specific to West Virginia'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 System Development Life Cycle (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 Data Improvement Project (DIP) body of work, working with the technical advisory and change management team subject matter experts (SMEs) to help align SDLC activities across all BMS vendors and data suppliers. Cate facilitates meetings between BerryDunn, State, and vendors to help track DIP efforts, including those related to Transformed Medicaid Statistical Information System (T-MSIS) needs and State reporting needs, reviews meeting notes, agendas, and monthly status reports, and helps draft and refine project deliverables. Cate manages the project team working together to support the State's use of an integrated change management tracking tool and to help promote efficiency and transparency in enterprise SDLC activities by establishing an orderly and effective procedure for tracking the submission, coordination, review, evaluation, and implementation of all system-related changes.

*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 Service Level Agreements (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, 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.

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

As an intermediary consultant, Cate coordinated appropriate communication and sharing of sensitive information between project parties, helping to ensure adherence to the established project time frame 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 thorough program of solid waste collection, processing, recycling, and disposal. Cate works alongside SWA board members to evaluate key County SWA issues, outreach needs, and project initiatives, including those related to staffing sourcing and maintenance, community engagement, and grant program funding evaluation and application, especially as relates to the County's recycling program management and community waste collection initiatives.

**Mountain State Eye Associates (04/2017 to 06/2021)**

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

She worked directly with Medicare, Medicaid, and commercial plans to help ensure patient coverage for medications and procedures and assisted in providing cost-reducing programs to patients; provided patients prescriptions through eprescribing 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 environment. She promptly answered customer inquiries in-person and via telephone and followed proper procedure for handling claims. Cate was knowledgeable about all departments of the store and products within each department; helped ensure that merchandise was properly labeled and priced and replenished as necessary; and traveled to assist in new store and existing store remodeling efforts.

From 2009 to 2012 as a cashier, Cate provided excellent customer service by ringing up purchases, assisting customers in locating/learning about merchandise, processing returns/exchanges, cashing government and payroll checks, and keeping front end clean, well-stocked, and free of hazards. Cate assisted other departments in working freight and coordinated special projects, including a sustainability plan to implement proper recycling procedures.

**Highmark WV Blue Cross Blue Shield (BCBS) (10/2012 to 07/2014)**

As a member services representative—Senior Markets, Cate provided quality customer care for Medicare Advantage Plans (MAPDs) and Prescription Drug Plans (PDPs) in accordance with HIPAA regulations and managed a high-volume workload by handling live-call member inquiries related to medical, prescription, vision and dental claims, enrollment and billing, benefits, and providers.

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

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

**Brass Pineapple Bed & Breakfast (01/2012 to 10/2012)**

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



## Kourtney Kirk

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

### EDUCATION AND CERTIFICATIONS

BS, Business Administration – Marketing, Glenville State University

Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT + MCMP II)

### PROPOSED PROJECT ROLE

Project Management Support Staff

### MEDICAID EXPERIENCE

3 years

Kourtney Kirk is an experienced project coordinator and consultant with an extensive knowledge of documentation, communications, and scheduling needs related to Medicaid Enterprise Systems (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, Advance Planning Documents (APDs), and Requests for Proposals (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 Medicaid Practice Group. Kourtney provides support to the Bureau for Medical Services, West Virginia'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)  
Contract Labor Management Services (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 and maintains meeting schedules and provides quality control for meeting materials to satisfy contract Service Level Agreements (SLAs). She maintains project information and tracks action items, risks, issues, and decisions, in addition to developing and distributing meeting minutes. As the lead coordinator for the EDS Project, she assists in the creation and maintenance of 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 and maintains meeting schedules and provides quality control for meeting materials to satisfy contract SLAs. She maintains project information and tracks action items, risks, issues, and decisions, in addition to developing and distributing meeting minutes. As the lead coordinator for the EDS Project, she assists in the creation and maintenance of APDs, project deliverables, and budgets, creates monthly status reports, and maintains project rosters for the PMO, client, and vendors. As a project consultant, she assists with research communication needs across various project workstreams.

**– 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 and maintained meeting schedules and provided quality control for meeting materials to satisfy contract SLAs. She maintained project information and tracked action items, risks, issues, and decisions, in addition to developing and distributing meeting minutes.

**N3 (03/2018 to 11/2018; 08/2019 to 08/2020)**

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

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

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

Kourtney worked directly with Microsoft as an inside sales account executive for Unified Support



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

**Total Quality Logistics (11/2018 to 08/2019)**

Kourtney served as a logistics account manager who was the primary contact for clients and independent freight carriers. She presented sales presentations to prospective clients, created a list of ongoing business accounts via prospecting networking and referrals, and managed daily shipments and confirmed pickup 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.



## 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 more than 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 Department of Social Services
- One year experience creating e-learning courses in Articulate products
- One year experience working in a learning management system
- 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)

Shandia is providing business analysis support and subject matter expertise.



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

*Engagement Coordination Support (01/2025 to present)*

Shandia provides review and tracking support for the engagement's statements of work.

*Organizational Development (OD) Project Phase II (07/2024 to present)*

Shandia is leading and executing the creation of four e-learning onboarding and training courses for the client.

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

Shandia completed the design and creation of four e-learning training courses and is providing coordination support for the project.

*Mountain Health Trust (MHT) MCO Procurement Assistance Project Phase II (02/2024 to 06/2024)*

Shandia led and executed the design and creation of four e-learning training courses.

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

*People's Access to Help (PATH) DDI Project Management (05/2023 to 06/2024)*

Shandia provided project coordination support and onboarding/training expertise.

– **Missouri Department of Social Services**

*Missouri Medicaid Enterprise (MME) Project Management Office (PMO) Engagement EVV*

*Aggregator Solution RFP Development (01/2021 to 05/2023)*

*MME PMO Program Integrity (02/2019 to 01/2021)*

*MME PMO Business Intelligence Solution – Data Warehouse Enterprise (04/2018 to 02/2019)*

Shandia supported the MME PMO through three implementation projects from start-up to certification and project closure. She not only provided document management, meeting facilitation, analysis, and metrics, but she improved client process and structures, led JAD sessions, and conducted User Acceptance Testing (UAT).

– **Internal Projects**

*Medicaid Learning Center (05/2024 to present)*

Shandia is leading and executing the redesign of dozens of Medicaid e-learning courses.

*West Virginia Engagement Operations Improvement Team (09/2023 to present)*

Shandia co-led the build out of the engagement's internal SharePoint Resource Library.

*Editorial/Quality Assurance (EQA) Champions (09/2023 to 09/2024)*

Shandia played a key role in modifying and improving EQA processes.

*Business Analysis Community of Practice (BACOP)*

Shandia is co-leading the practice group and its initiatives.

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

As the membership and special events coordinator, Shandia provided administrative support through document and database management and event planning and coordination.

**United Landscape Design (2017)**

As an office administrator, Shandia led the design and implementation of organizational and systematic process and structure change within the company to increase efficiency, promote efficacy, and support the goals and visions of the business.

**Lighthouse Preparatory Academy**

– **Office Manager (2015 to 2017)**

As an office manager, Shandia assisted in establishing systems and structures to help the office and organization run more effectively. In addition, Shandia oversaw daily accounting activities for the general ledger; assisted in the preparation of the annual budget; helped resolve accounting,



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payroll, and financial issues; maintained office records; and conducted meetings with Academy staff.

– **Teacher (2012 to 2016)**

In her role as an educator at Lighthouse Preparatory Academy, a university-model school, Shandia developed course curriculum, created class lessons, and taught subject matter for classes in literature, language, and logic; English composition; and psychology, among others.

– **Dean (2012 to 2015)**

In her role as a Dean at Lighthouse Preparatory Academy, she developed and provided training and onboarding for all families and teachers — new and existing.



## Samuel “Sam” 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 design, development, and implementation (DDI) and maintenance and operations (M&O) deliverables by working collaboratively with the vendor and the client to produce, review, and approve each contract document as it relates to the system. He implements quality controls to 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) Children with Serious Emotional Disturbance (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 executives. For IBM®, this was focused on DB2 and VMware adoption.



For Magento and Adobe, this was focused on e-Commerce 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.



# Alycia Minshall, MA

DOCUMENTATION SPECIALIST  
Berry, Dunn, McNeil & Parker, LLC



Alycia Minshall is an editing and communications professional with more than 15 years of experience in higher education and corporate settings. She excels in copywriting, editing, and collaborating on deliverables.

**EDUCATION AND  
CERTIFICATIONS**

MA, English Language  
and Literature, Central  
Michigan University  
BA, English, Alma College  
Poynter ACES Certificate  
in Editing

**PROPOSED PROJECT  
ROLE**

Project Management  
Support Staff

**RELEVANT EXPERIENCE**

16 years

**PROJECT EXPERIENCE**

**BerryDunn (08/2022 to Present)**

Alycia works with the BerryDunn team in West Virginia to offer documentation support, including copyediting, proofreading, and formatting services for deliverables. She also develops and delivers presentations on various writing topics such as creating accessible documents; integrating diversity, equity, and inclusion principles into writing; and using PerfectIt to self-edit.

**Alycia Minshall Editing Services (03/2014 to Present)**

Alycia provides editing services to clients across a variety of assignments, including poetry books, master’s theses, and doctoral dissertations. She fact-checks, copyedits, and proofreads documents, helping 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 requests for proposals; case studies; meeting notes; and more. She helped ensure consistency in voice, brand, and tone across messaging channels and that all materials are well written, accurate, properly researched, objective, and concise. She managed a team of editors, providing guidance on improving speed and accuracy as well as continuing education. She also maintained the company style guide, updating the document annually to help ensure proper terminology and appropriate treatment of diversity, equity, and inclusion principles.





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**– Editor (04/2017 to 06/2020)**

As an editor, Alycia copyedited, proofread, and fact-checked marketing collateral; web copy; press releases; research reports; financial, legal, and technical documents; presentations; social media copy; proposals and requests for proposals; and meeting notes. She helped ensure materials were accurate, objective, concise, and consistent in voice, brand, and tone across messaging channels.

**University of Southern California Graduate School of Social Work (09/2015 to 06/2016)**

Alycia served as 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.



## 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 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.



## Grace Min

DOCUMENTATION SPECIALIST  
Berry, Dunn, McNeil & Parker, LLC



**EDUCATION AND  
CERTIFICATIONS**

BA, English Literature,  
*summa cum laude*, Oral  
Roberts University

**PROPOSED PROJECT  
ROLE**

Project Management  
Support Staff

**RELATED EXPERIENCE**

8 years

Grace Min is an experienced technical writer and editor, bringing experience in copywriting, project management, research, quality assurance, and proofreading.

**PROJECT EXPERIENCE**

**BerryDunn (11/2024 to present)**

Grace supports the consulting services group, working on the Editorial/Quality Assurance team. Grace reviews, formats and copyedits client deliverables, as well as service level agreements.

**Freelance Technical Writer (01/2020 to present)**

Grace performs thorough research into subjects requested by clients to write clear and accurate articles, manuals, proposals, standard operating procedures (SOP), and research reports. She collaborates with subject matter experts (SME) and refines information to create clear documentation, cross-checks sources and information to help ensure accuracy, and helps to ensure all content is optimized for SEO purposes.

**Contract Copy Editor/Proofreader (06/2017 to present)**

Grace reviews and edits a variety of manuscripts including academic articles, books, essays, and informational material. She proofreads and refine material for grammar, syntax, and style; verifies the validity of all content through meticulous fact-checking; and maintains style guide requirements.

**Oral Roberts University Graduate School of Theology and Ministry  
(08/2016 to 05/2017)**

As a graduate research assistant, Grace conducted academic research for the dean of the College of Theology and Ministry and professors. She assisted professors with grading and presentations, maintained confidential student records and updated information, and answered student and visitor inquiries.

**Oral Roberts University History, Humanities, and Government  
Department (08/2015 to 05/2016)**

Grace assisted professors in grading and attendance, updated computer log of student petitions, and designed and maintained department bulletin boards.



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**Private SAT Tutor (05/2015 to 08/2015)**

Grace developed individualized SAT study plans for the reading, writing and essay sections. She conducted tutoring sessions, administered regular practice tests, and monitored student progress.

**ORU Writing Center (08/2015 to 12/2015)**

As a writing tutor, Grace provided personalized feedback to students on their essays, focusing on clarity, coherence, grammatical accuracy, and adherence to style guides. She guided students through grammar and writing tutorials, and conducted one-on-one tutoring sessions to address individual writing challenges to enhance overall writing skills.

**Oral Roberts University (08/2014 to 05/2015)**

As an academic peer advisor, Grace provided individualized tutoring to students for various subjects. She edited student papers and worked with student leadership in dormitories.

**Private Dental Practice (2012 to 2016)**

As an office assistant, Grace checked in patients, verified insurance information, and processed payments. She also answered phone calls and responded to patient inquiries, scheduled and confirmed patient appointments, and updated patient records.



# Megan Hamilton, MA

DOCUMENTATION SPECIALIST  
Berry, Dunn, McNeil & Parker, LLC



Megan Hamilton is an experienced editor and has worked 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.

**Seglan Manufacturing Group (01/2012 to 01/2022 [seasonal])**

Megan served as an administrative assistant, directly under Finance



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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.



## Jonathan Williams, MA, LSSGB

DOCUMENTATION SPECIALIST

Berry, Dunn, McNeil & Parker, LLC



Jon Williams is an experienced writer and editor, bringing more than 20 years of experience in proofreading, copyediting, and professional writing across several industries. He works with BerryDunn 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 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 ([mwtnnewsandviews.com](http://mwtnnewsandviews.com)), social media, and other projects. He serves on a committee that established the company's brand guidelines and now works to help ensure those guidelines are followed on all materials, internal and external.

#### Mitchell Equipment Corporation (02/2002 to 11/2004)

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

#### Spring Hill Nurseries (02/2001 to 06/2001)

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





## Jordan Ramsey, MA, LSSGB

DOCUMENTATION SPECIALIST

Berry, Dunn, McNeil & Parker, LLC



### EDUCATION AND CERTIFICATIONS

MA, English, Professional Writing, Southeast Missouri State University

BA, Liberal Arts and Sciences, English Literature and Creative Writing, University of Illinois at Urbana-Champaign

Lean Six Sigma Green Belt

Poynter ACES Certificate in Editing

### PROPOSED PROJECT ROLE

Project Management Support Staff

### RELEVANT EXPERIENCE

14 years

Jordan Ramsey is a Consulting Services Support Manager in BerryDunn's Government Consulting Group and manager of Editorial/QA. He provides document quality assurance and editing for BerryDunn client deliverables and marketing/communications documents. Jordan is a Poynter American Copy Editors Society (ACES) Certified Editor and Lean Six Sigma Green Belt; he also holds an MA in English: Professional Writing.

### 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.



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**Southeast Missouri State University (2015 to 2017)**

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

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

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

**The Southern Illinoisian (2014 to 2015)**

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

**Other Teaching Experience (2006 to 2010)****– Lanier Technical College**

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

**– Hardin County, IL**

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

**– NOVA Group of Japan**

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



## KD Dobyne

### PROJECT COORDINATOR

Berry, Dunn, McNeil & Parker, LLC



### EDUCATION AND CERTIFICATIONS

BA, Linguistics, University of Texas at Arlington

### PROPOSED PROJECT ROLE

Project Management Support Staff

### RELEVANT EXPERIENCE

3 years

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.

### PROJECT EXPERIENCE

#### BerryDunn (09/2023 to present)

KD serves as a project coordinator for BerryDunn consulting teams, working with government and quasi-government clients. She helps compile deliverables, create visual aids, and project tracking.

#### Qualtek Wireless (08/2022 to 09/2023)

As a project coordinator, KD was responsible for responding to client needs to help ensure successful receipt of project deliverables, including spreadsheets, PowerPoints, and closeout packages. She created and delivered purchase orders and also managed materials through Salesforce. She took responsibility for all administrative tasks and managed Verizon's Software Project Management (SPM) Tracker. KD also identified and communicated potential hurdles and areas for improvement within multiple project timelines.

#### University of Texas at Arlington (08/2018 to 05/2019)

As president of the Asian Student Association, KD managed multiple projects at once to plan and execute a successful year for the organization. She acted as the "face" of the organization by attending presidential roundtables and meeting with the President of the University to track progress and identify any issues. KD led and oversaw the planning and execution of fundraising and events, while staying on schedule and within the organization's budget.

#### Joliet Junior College (08/2016 to 05/2017)

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



## Carole Ann Guay

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



### EDUCATION AND CERTIFICATIONS

BS, Accounting, University of Southern Maine

### PROPOSED PROJECT ROLE

Project Management Support Staff

### RELEVANT EXPERIENCE

9 years

Carole Ann Guay is a senior consultant for BerryDunn's Consulting Services Project Support group. She has over eight years' experience as a project coordinator, 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.

### 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 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 a Request for Proposal (RFP), and assisting the DOC with its selection of a new Offender Management System.

##### **– 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



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 scope of work for AZDA's IT Modernization Strategic Initiative.

**- Montana Department of Corrections (MDOC)**

*OIS 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)**

*Commercial Off-the-Shelf (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**

*Eligibility and Enrollment (E&E) Independent Security and Privacy Controls Assessment (01/2017 to 07/2017)*

Carole Ann served as an analyst for West Virginia 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



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remediation.

**Webber Energy Fuels (2004 to 2014)**

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



## Sophia Guerrero, BBA

### CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



### EDUCATION AND CERTIFICATIONS

BBA, Marketing, Texas State University

AS, Business Administration, Austin Community College

### PROPOSED PROJECT ROLE

Project Management Support Staff

### RELEVANT EXPERIENCE

4 years

Sophia Guerrero is a skilled Adobe Creative Suite designer and editor, specializing in consulting services. Sophia's meticulous attention to detail in designing BerryDunn final deliverables and her proficiency in recreating graphics infuses every project with creativity and depth. She effortlessly navigates the intricacies of spacing, typography, and visual hierarchy, helping to ensure that her designs are both aesthetically pleasing and user-friendly.

### PROJECT EXPERIENCE

#### BerryDunn (2022 to present)

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

#### – Digital Media and Graphic Designer (2022 to 01/2025)

In her role as designer/editor, Sophia worked within the Adobe Creative Suite with proficiency in InDesign, Illustrator, and Photoshop. She was responsible for implementing a new submission ticketing system for consulting projects, as well as communicating with consultants regarding the layout and formatting of final deliverables. Sophia supported BerryDunn's consulting groups by providing unique design layouts, formatting copy, editing, and other design quality assurance tasks for client deliverables. Sophia has experience creating many types of deliverables, such as flyers, postcards, and newsletters.

#### GP RED (2021 to present)

Sophia works as a video editor and designer for GP RED, a 501(c)(3) non-profit organization whose goal is to recognize and expand research, education, and resource development activities for "quality-of-life" agencies. Their goal is to build an environment to create, translate, and disseminate knowledge from research into practice. She supports the organization by managing the GP RED YouTube Channel and creating video content for promotional purposes.

#### GreenPlay, LLC (2021 to 2022)

Sophia worked as a social media marketing manager and InDesigner for the Parks and Recreation consulting group. She supported the team by creating unique report designs, editorial proofing, and print





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tasks for public facing documents and deliverables.

**Row Business Solutions (2020 to 2021)**

Sophia worked as an SEO copywriter and social media manager. She managed a broad range of digital marketing solutions for clients across the U.S., including social media management, keyword research, and blog writing. She helped train 30+ interns by delegating marketing tasks, editing content, and regularly maintaining accountability of interns.

**American Gateways Translator (2019)**

Sophia worked as a Spanish Translator with The American Gateways Organization.



## Appendix B: Deliverable Dictionary

**Table 4: Deliverable Dictionary**

Deliverable ID	Deliverable Name	Deliverable Description
01	Commissioner Briefing	This document is a monthly status update delivered to the BMS Commissioner.
02	Monthly Status Report	This is a monthly status update delivered to the project sponsor(s) and project lead(s). Upon Project close, a final MSR will be delivered for acceptance by the project sponsor or their designee to signal successful completion of the project
03	APD (As Needed)	The project team will compile APDs on an as-needed basis upon request from the State. Any APDs will be submitted to the State and/or its partners for submission to CMS.
04	APD Updates (As Needed)	The project team will compile APD-Us on an as-needed basis upon request from the State. Any APD-Us will be submitted to the State and/or its partners for submission to CMS.



## Appendix C: Acronyms/Abbreviations

**Table 5: Acronyms/Abbreviations**

Acronym/Abbreviation	Definition
APD	Advance Planning Document
BerryDunn	Berry, Dunn, McNeil & Parker, LLC
BMS	Bureau for Medical Services
CL	Commodity Line
CMA	Centralized Master Agreement
CMS	Centers for Medicare and Medicaid Services
DoHS	Department of Human Services
EM	Engagement Manager
GPM	General Project Manager
IAPD-U	Implementation Advance Planning Document Update
LPM	Lead Project Manager
MES	Medicaid Enterprise System
MITA	Medicaid Information Technology Architecture
MMIS	Medicaid Management Information System
MSR	Monthly Status Report
PM	Project Manager
SMA	State Medicaid Agency
SOW	Scope of Work
SS	Project Management Support Staff
State, WV	West Virginia





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

Alex J. Mayer  
Cabinet Secretary

Cynthia Beane, MSW, LCSW  
Commissioner

DATE: June 5, 2025

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

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

RE: PF1714155, CDO BMS25\*47  
Dept 0511

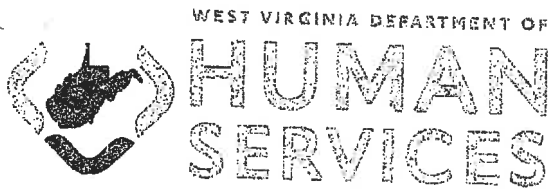
The West Virginia Bureau for Medical Services (BMS) respectfully requests the approval of the above-referenced CDO for services performed by Berry, Dunn, McNeil & Parker LLC under PF785940, CMA HHR21\*03.

These services are to assist the West Virginia Department of Human Services (DoHS) Bureau for Medical Services (BMS) by providing support for Partnership Management Project Phase III. The service period 06/15/2025-06/14/2026. The total estimated cost is \$872,580.00.

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](mailto:althea.m.greenhowe@wv.gov). Thank you for your time and consideration in this matter.







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

Alex J. Mayer  
Cabinet Secretary

Cynthia Beane, MSW, LCSW  
Commissioner

Date: June 4, 2025

To: Office Shared Administration/Finance

From: Jimmy Dowden, WVPBC  
Director  
BMS, Procurement Services

Re: PF1714155, CDO BMS25\*47  
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\*47

Partnership Management  
Project Phase III

06/15/2025-04/30/2026

05/01/2026-06/14/2026

2026 Payment		2027 Payment	
Lead Project Manager hours @ \$215	\$18,490.00	Lead Project Manager hours @ \$215	\$3,010.00
Engagement Manager hours @ \$270	\$55,080.00	Engagement Manager hours @ \$270	\$9,720.00
General Project Manager hours @ \$190	\$521,740.00	General Project Manager hours @ \$190	\$91,580.00
Project Management Support Staff hours @ \$80	\$147,360.00	Project Management Support Staff hours @ \$80	\$25,600.00
	\$742,670.00		\$129,910.00
	Grand Total:		\$872,580.00







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.cowden@wv.gov](mailto:jimmy.k.cowden@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 office.

1. He would like a synopsis of the purchase. I would suggest in most cases we can pull the extended description populate that in the email to him.
2. Please note if there is a specific timeframe in the request.
3. Contracts will be reviewed at the Master Agreement level meaning that he will not be approving DOs.
4. Renewals for contracts over \$100,000 must be approved.

This process is going to be fluid and will likely morph as we move forward but this is the best information that I have today.

Bryan



Filter By

## Keyword Search

For more information on how to use our keyword search, visit our [help guide](#)

Simple Search

Search Editor

☐ Any Words <sup>i</sup>

☐ All Words <sup>i</sup>

☐ Exact Phrase <sup>i</sup>

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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Would you like to include inactive records in your search results?

Search Inactive

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## West Virginia Secretary of State — Online Data Services

### Business and Licensing

Online Data Services Help

### Business Organization Detail

*NOTICE: The West Virginia Secretary of State's Office makes every reasonable effort to ensure the accuracy of information. However, we make no representation or warranty as to the correctness or completeness of the information. If information is missing from this page, it is not in the The West Virginia Secretary of State's database.*

### BERRY, DUNN, MCNEIL & PARKER, LLC

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

Organization Information								
<b>Business Purpose</b>	5511 - Management of Companies and Enterprises - Management of Companies and Enterprises - Management of Companies and Enterprises Including Offices of Bank Holding Companies and Other Holding Companies			<b>Capital Stock</b>				
<b>Charter County</b>	Kanawha			<b>Control Number</b>	0			
<b>Charter State</b>	ME			<b>Excess Acres</b>				
<b>At Will Term</b>	A			<b>Member Managed</b>	MBR			
<b>At Will Term Years</b>				<b>Par Value</b>				
<b>Authorized Shares</b>				<b>Young Entrepreneur</b>	Not Specified			





## Addresses

Type	Address
<b>Designated Office Address</b>	209 WEST WASHINGTON STREET CHARLESTON, WV, 25302
<b>Mailing Address</b>	2211 CONGRESS STREET PORTLAND, ME, 04102 USA
<b>Notice of Process Address</b>	URA SERVICES, INC. 5098 WASHINGTON STREET W. SUITE 407 CHARLESTON, WV, 25313
<b>Principal Office Address</b>	2211 CONGRESS STREET PORTLAND, ME, 04102 USA
Type	Address

## Officers

Type	Name/Address
<b>Member</b>	CHARLES K. LEADBETTER III 2211 CONGRESS STREET PORTLAND, ME, 04102
<b>Member</b>	SETH E. WEBBER 2211 CONGRESS STREET PORTLAND, ME, 04102
<b>Member</b>	KATHY PARKER, C.P.A. 2211 CONGRESS STREET PORTLAND, ME, 04102
<b>Member</b>	SARAH BELLIVEAU, C.P.A. 2211 CONGRESS STREET PORTLAND, ME, 04102
Type	Name/Address

## DBA

DBA Name	Description	Effective Date	Termination Date
BERRY DUNN	TRADENAME	3/21/2011	
BERRY, DUNN, MCNEIL & PARKER, PLLC	TRADENAME	11/5/2019	



BA Name	Description	Effective Date	Termination Date
<b>Annual Reports</b>			
<b>Filed For</b>			
2025			
2024			
2023			
2022			
2021			
2020			
2019			
2018			
2017			
2016			
2015			
2014			
2013			
2012			
2011			
2010			
2009			
<b>Date filed</b>			

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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